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# BIOLOGICAL SCIENCES

## ЦЕНТРАЛЬНА ГЕМОДИНАМІКА У САНГВІНІКІВ ТА МЕЛАНХОЛІКІВ

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## CENTRAL HEMODYNAMICS IN SANGUINES AND MELANCHOLICS

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**Аннотация**

Научные физиологические публикации содержат достаточно глубокий анализ количественных и качественных изменений в гематологических показателях, вызванных формированием стресс-реакций к стресс-факторам различного генезиса. Формирование стресс-реакций и адаптационных реакций контролируются центральной нервной системой, а именно вегетативной нервной системой и имели определенную зависимость от типа высшей нервной деятельности. Опираясь на вышеизложенное можно предположить, что тип высшей нервной деятельности (ВНД) влияет не только на показатели крови, но и на другие функциональные показатели организма, среди которых есть показатели центральной гемодинамики.

Целью нашего исследования является сравнительный анализ показателей центральной гемодинамики и интегративных гемодинамических индексов у сангвиников и меланхоликов.

Работа выполнялась в соответствии с биоэтическими нормами с соблюдением соответствующих принципов Хельсинкской декларации прав человека, Конвенции Совета Европы о правах человека и биомедицине и соответствующих законов Украины.

При сравнении показателей центральной гемодинамики следует отметить максимальные значения, присущие сангвиникам (пульс 98,8 уд/мин, артериальное давление 139/76 мм.рт.ст., минутный объем крови 6,9 л/мин, мощность работы левого желудочка 1,7 Вт, минимальные адаптационные резервы были характерны для меланхоликов (вегетативный индекс Кердо -3,9 у.е.); максимальные адаптационные резервы – для сангвиников (вегетативный индекс Кердо -7,44 у.е.); максимальные энергетические затраты для обеспечения кровообращения характерны для сангвиников (6340,3 у.е.) по сравнению с меланхоликами (4704,57 у.е.).

Таким образом, показатели центральной гемодинамики указывали на формирование признаков функциональной нагрузки в деятельности сердца у сангвиников с незначительной тенденцией компенсации сосудистого русла для облегчения работы сердца; минимальные адаптационные возможности и резервы были характерны для меланхоликов.

**Abstract**

Scientific physiological publications contain a sufficiently deep analysis of quantitative and qualitative changes in hematological indicators caused by the formation of stress reactions to stress factors of various genesis. The formation of stress reactions and adaptive reactions is controlled by the central nervous system, namely the autonomic nervous system and had a certain dependence on the type of higher nervous activity. Based on the above, it can be assumed that the type of higher nervous activity (HNA) affects not only blood indicators, but also other functional indicators of the body, including indicators of central hemodynamics.

The purpose of our study is to conduct a comparative analysis of indicators of central hemodynamics and integrative hemodynamic indices in sanguine and melancholic individuals.

The work was carried out in accordance with bioethical norms in compliance with the relevant principles of the Helsinki Declaration of Human Rights, the Council of Europe Convention on Human Rights and Biomedicine and the relevant laws of Ukraine.

When comparing the indicators of central hemodynamics, it should be noted that the maximum values were characteristic of sanguine people (pulse 98.8 beats/min, blood pressure 139/76 mmHg, minute blood volume 6.9 l/min, left ventricular output 1.7 W); the minimum adaptive reserves were characteristic of melancholics (vegetative Kerdo index -3.9 c.u.), the maximum adaptive reserves were characteristic of sanguine people (vegetative

Kerdo index -7.44 c.u.); the maximum energy expenditure to ensure blood circulation was characteristic of sanguine people (6340.3 c.u.) compared to melancholics (4704.57 c.u.).

Thus, the indicators of central hemodynamics indicated the formation of signs of functional load in the activity of the heart in sanguine people with a slight tendency to compensate the vascular bed to facilitate the work of the heart; minimal adaptive capabilities and reserves were characteristic of melancholics.

**Ключові слова**: центральна гемодинаміка, гемодинамічні індекси, артеріальний тиск, СОК, ХОК, потужність роботи, регуляція діяльності серця та серцево-судинної системи, економічність кровообігу, адаптація та адаптаційні резерви, типи ВНД.

**Keywords:** central hemodynamics, hemodynamic indices, blood pressure, systolic and minute blood volume, work capacity, regulation of the heart and cardiovascular system, circulatory efficiency, adaptation and adaptive reserves, ypes of higher nervous activity.

**Вступ.** Діяльність серцево-судинної системи, а саме показники центральної гемодинаміки та інтегративних гемодинамічних індексів, має функціональне значення для визначення адаптаційних резервів та потенціалів організму до впливу стрес-факторів різного генезису. Вважається що показники функціонування серцево-судинної системи мають індикативні ознаки, що характеризують ступінь функціонального навантаження та рівень адаптаційних можливостей цілісного організму, а також опосередковано характеризують ступінь функціональної активації складових вегетативної нервової системи, які відповідають за формування адаптаційних та компенсаторних реакцій організму до стрес-факторів різного генезису [3; 10].

Наукові фізіологічні публікації містять достатньо глибокий аналіз кількісних та якісних змін в гематологічних показниках викликаних формуванням стрес-реакцій до стрес-факторів різного генезису. Формування стрес-реакцій та адаптаційних реакцій контролюються центральною нервовою системою, а саме вегетативною нервовою системою та мали певну залежність від типу вищої нервової діяльності. Виявлена кореляційна залежність між кількістю еритроцитів, концентрацією гемоглобіну та силою нервових процесів і їх лабільністю (сила нервових процесів та лабільність основних нервових процесів є складовими, що характеризують тип вищої нервової діяльності). Сильний та урівноважений тип характеризується зменшенням еритроцитів на 5 %, сильний, врівноважений та інертний тип характеризувався зменшенням кількості еритроцитів на 7 % при формуванні адаптаційних реакцій до стрес-факторів. У представників сильного урівноваженого типу ВНД формування адаптаційних реакцій супроводжувалось вираженим процесом еритроцитопоезу, в порівняні з представниками інших типів ВНД [2; 9].

Враховуючи вище викладене можна припустити, що тип вищої нервової діяльності (ВНД) впливає не лише показники периферійної крові, а й на інші функціональні показники організму, в тому числі і на показники центральної гемодинаміки та інтегративних гемодинамічних індексів.

Таким чином, метою нашого дослідження є проведення порівняльного аналізу показників центральної гемодинаміки та інтегративних гемодинамічних індексів у сангвініків та меланхоліків.

**Методи та організація дослідження.** В нашому дослідженні взяла участь група волонтерів загальною кількістю 90 осіб (чоловічої та жіночої статі 51 % та 49 % відповідно), середній вік яких становив 21,4±1,5 рік. Волонтери були поділені за типом ВНД на 2 групи в кожній групі по 45 осіб. Всі волонтери давали письмову згоду на участь в нашому дослідженні.

Тип вищої нервової діяльності визначали за допомогою тестового-опитувальника [5; 7]. Стан показників центральної гемодинаміки визначали за такими показниками: частота серцевих скорочень (ЧСС), середня тривалість серцевого циклу, артеріальний тиск (систолічний та діастолічний), пульсовий тиск (ПАТ або ПТ), середній артеріальний тиск, систолічний об'єм крові (СОК), хвилинний об'єм крові (ХОК), секундний об'єм крові, серцевий індекс (СІ), коефіцієнт економічності кровообігу (КЕК), потужність роботи лівого шлуночка серця (Wлш), індекс Робінсона (ІР), вегетативний індекс Кердо (ВІК), загальний периферійний опір судин (ЗПО) [3; 6; 8].

Для вимірювання ЧСС, систолічного та діастолічного тиску (САр. та ДАр.тиск) проводили за допомогою автоматичного вимірювача артеріального тиску Gamma control (Велика Британія) [11]. Всі вимірювання проводилися тричі в статистичну обробку бралися середньоарифметичні значення.

Статистичну обробку матеріалу здійснювали з допомогою програми Microsoft Excel. Визначали середнє значення та його похибку. Різницю між різними групами визначали за t-критерієм Стьюдента.

Робота виконувалась у відповідності до біоетичних норм з дотриманням відповідних принципів Гельсінської декларації прав людини, Конвенції ради Європи про права людини і біомедицини та відповідних законів України [1; 4].

**Результати досліджень та їх обговорення.** Результати досліджень представлені в таблиці 1. Значення ЧСС у сангвініків були за межами референтних значень. У сангвініків ЧСС біла достовірно більша ніж у меланхоліків на 15 % (12,8 уд/хв.). При цьому середня тривалість серцевого циклу в усіх типах ВНД не виходила за межі референтних значень. У сангвініків та меланхоліків середня тривалість серцевого циклу не мала достовірної різниці, але у сангвініків вона була меншою на 14,0 % (0,1 мс.).

Таблиця 1.

Показники центральної гемодинаміки та інтегративних гемодинамічних індексів з урахуванням типу ВНД (M±m).

| Показники | Референтні значення | Сангвініки | Меланхоліки |
|---|---|---|---|
| ЧСС, уд/хв | 50-90 | 98,8±2,9 | 86±4,1* |
| Середня тривалість серцевого циклу, мс. | 1,2-0,66 | 0,6±0,08 | 0,7±0,06 |
| САр. тиск, мм.рт.ст. | 110-120 | 139,0±2,6 | 120,0±3,42* |
| ДАр. тиск, мм.рт.ст. | 70-80 | 76,0±2,7 | 67,6±2,12* |
| ПАТ (ПТ), мм.рт.ст. | 40-60 | 63,0±1,6 | 52,43±2,9* |
| САР. тиск, мм.рт.ст. | 80,0-100 | 91,1±2,32 | 85,04±2,35* |
| СОК, мл. | 44-60 | 70,1±1,5 | 69,7±1,6 |
| ХОК, мл/хв | 3000-4000 | 6925,9±22,2 | 5994,4±16,9* |
| Секундний об'єм крові, мл/с. | 50-66,66 | 115,43±1,2 | 99,91±1,6* |
| СІ, у.о. | - | 9,1±0,31 | 7,83±0,27* |
| $W_{лш}$, Вт. | - | 1,7±0,05 | 1,23±0,04* |
| КЕК, у.о. | 2600 | 6340,3±46,5 | 4704,57±34,23* |
| ІР, у.о. | - | 129,82±5,37 | 105,5±3,81* |
| ВІК, у.о. | - | - 7,44±0,12 | -3,9±0,15* |
| ЗПО, у.о. | - | 1122,2±29,8 | 1131,8±21,2 |

* - достовірна різниці в порівняні з сангвініками

Величина САр. тиску у меланхоліків не виходили за межі референтних значень. Сангвінікі мали достовірно більший САр. тиск в порівняні з меланхоліками на 15,8 % (19,0 мм.рт.ст.). Така ж сама закономірність спостерігалась в показниках ДАр. тиску, сангвініки мали достовірно більші показники в порівняні з меланхоліками на 12,4 % (8,4 мм.рт.ст.).

Показники ПАТ у меланхоліків були в межах референтних значень, а у сангвініків були більші референтних значень. Так величина ПАТ у сангвініків була достовірно більшою в порівняні з меланхоліками на 20 % (10,6 мм.рт.ст.).

Величини САР тиску як у сангвініків так і меланхоліків була в межах референтних значень. Сангвініки мали достовірно вищі значення САР тиску в порівняні з меланхоліками 7,0 % (6,1 мм.рт.ст.) відповідно.

Таким чином, показники кров'яного тиску у сангвініків вказують на достатньо виражене функціональне навантаження на судинне русло в порівнянні з меланхоліками. Також слід звернути увагу на формування ознак функціонального навантаження в діяльності серцевого м'язу, що підтверджується показниками ЧСС та середньою тривалістю серцевого циклу.

Значення СОК у сангвініків та меланхоліків не мали достовірної різниці, але були більші за референтні значення. Показники СОК також опосередковано вказують на формування ознак функціонального навантаження на серцевий м'яз.

ХОК у сангвініків був достовірно більший в порівняні з меланхоліками на 13,4 % (931,5 мл/хв.). Збільшення ХОК у сангвініків зумовлено значною частотою серцевих скорочень в порівняні з меланхоліками. Збільшення ХОК за рахунок ЧСС вказує на слабку адаптацію серцево-судинної системи до функціональних навантажень.

Секундний об'єм крові у сангвініків був достовірно більший в порівняні з меланхоліками на 15,5 % (15,5 мл/с). Зростання секундного об'єму крові у сангвініків зумовлене збільшенням ХОК та ЧСС.

Значення СІ були достовірно більші у сангвініків в порівняні з меланхоліками на 16,2 % (1,27 у.о.). Такі зміни в показниках СІ вказують на формування ознак порушення в діяльності серцевого м'язу. Така ж сама закономірність спостерігалась в показниках $W_{лш}$. У сангвініків $W_{лш}$ була достовірно більша в порівняні з меланхоліками на 38,2 % (0,47 Вт.).

Всі вище згадані показники вказують на формування ознак функціонального напруження в діяльності серця у сангвініків.

КЕК у сангвініків був достовірно більший в порівняні з меланхоліками на 34,8 % (1635,7 у.о.). Таким чином, у сангвініків кровообіг характеризується максимальними енергетичними затратами в порівняні з меланхоліками. Показники КЕК у сангвініків, також вказують на значне функціональне навантаження серцевого м'язу. Значення КЕК та $W_{лш}$. у сангвініків додатково підтверджують про наявність функціонального напруження в діяльності серця.

У сангвініків ІР мав достовірно більші значення в порівняні з меланхоліками, а саме був більший на 23,1 % (24,3 у.о.). Таким чином значення ІР у сангвініків вказують на формування вираженої ознаки порушення регуляції діяльності серцево-судинної системи.

Значення ВІК у сангвініків було достовірно менше в порівняні з меланхоліками на 47,6 % (3,54 у.о.), що говорить про значну активацію парасимпатичної складової вегетативної нервової системи. У меланхоліків значення ВІК вказують на зменшення адаптаційних резервів організму до стресового впливу різного генезису. Згідно значень ВІК у меланхоліків спостерігається активація парасимпатичної нервової системи, але значно менша в порівняні з сангвініками.

ЗПО у сангвініків та меланхоліків не мав достовірних відмінностей. Отримані нами результати вказують на відсутність компенсаторних реакцій кровоносних судин на фоні ознак функціонального навантаження в діяльності серця у сангвініків.

**Висновок.** При порівняні показників центральної гемодинаміки слід відмітити максимальні значення були притаманні сангвініками (пульс 98,8 уд/хв, артеріальний тиск 139/76 мм.рт.ст., хвилинний об'єм крові 6,9 л/хв., потужність роботи лівого шлуночка 1,7 Вт.,); мінімальні адаптаційні резерви були характерні для меланхоліків (вегетативний індекс Кердо -3,9 у.о.) максимальні адаптаційні резерви – для сангвініків (вегетативний індекс Кердо - 7,44 у.о.); максимальні енергетичні затрати для забезпечення кровообігу характерні для сангвініків (6340,3 у.о. ) в порівняні з меланхоліками (4704,57 у.о.).

Таким чином показники центральної гемодинаміки вказували на формування ознак функціонального навантаження в діяльності серця у сангвініків з незначною тенденцією компенсації судинного русла для полегшення роботи серця; мінімальні адаптаційні можливості та резерви були характерні для меланхоліків.

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# MILITARY SCIENCES

## NATIONAL MILITARY IDEOLOGY AND ITS REFLECTION IN AZERBAIJANI LITERATURE: IMPLICATIONS FOR CADET EDUCATION

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**Abstract**

This article explores the formation and consolidation of national military ideology and examines its reflection in Azerbaijani literature as a powerful tool for shaping patriotism, moral resilience, and identity among cadets. Azerbaijani literary heritage—from classical patriotic narratives to contemporary war literature—plays a crucial role in constructing national spirit, reinforcing historical memory, and promoting devotion to the homeland. By analyzing key literary motifs such as heroism, sacrifice, loyalty, and the sanctity of national territory, the study highlights how literature not only documents historical struggles but also cultivates ideological consciousness and emotional commitment among future military officers. The article further discusses the pedagogical significance of integrating national literature into military education, arguing that literary exposure enhances cadets' ethical awareness, national values, and psychological readiness. The findings suggest that the synthesis of military ideology and literary influence strengthens identity formation, fosters moral responsibility, and contributes to the development of ideologically firm and professionally prepared military personnel in Azerbaijan.

**Keywords:** National military ideology; Azerbaijani literature; patriotism; military education; cadet training; national identity; moral resilience; historical memory; ideological formation; leadership development.

**Introduction**

In the context of contemporary military education, national military ideology functions as a fundamental ideological and psychological pillar ensuring loyalty to the state, moral resilience, and professional dedication. The formation of such ideology among cadets requires deep cultural and literary foundations. Azerbaijani literature, with its rich tradition of patriotism, heroism, and national consciousness, plays a crucial role in shaping national military ideology and strengthening the moral-psychological preparedness of future officers (Nizami Ganjavi, 1197/2008; Fuzuli, 16th century/2004; Yusifli, 2020).

**Concept and Essence of National Military Ideology**

National military ideology is a system of values, beliefs, and principles grounded in national history, cultural heritage, moral norms, and state interests. In Azerbaijan, this ideology reflects the collective memory of struggle and resistance and serves as a guiding framework for military behavior and ethical decision-making (Aliyev, 2018; Rəsulzadə, 1923/2013).

**Psychological Foundations of National Military Ideology**

From a psychological perspective, national military ideology operates through mechanisms of identification, internalization, and emotional attachment. Cadets internalize ideological values when they perceive them as part of their personal and national identity. Literary narratives that depict heroic struggle, sacrifice, and devotion to the homeland reinforce these psychological mechanisms by creating emotional resonance and moral exemplars (Bartone, 2006; Matthews et al., 2006).

**Azerbaijani Literature as a Carrier of National Military Ideology**

Azerbaijani literature has historically functioned as a powerful medium for transmitting national and military ideals. Classical and modern literary works portray the defense of the homeland as a sacred duty and elevate the concepts of honor, courage, and sacrifice (Nizami Ganjavi, 1197/2008; Fuzuli, 16th century/2004). In the twentieth century, Azerbaijani writers increasingly addressed themes of national identity, resistance, and military valor, reflecting the socio-political struggles of the nation (Yusifli, 2020; Aliyev, 2018).

**Military-Patriotic Motifs in Modern Azerbaijani Literature**

Modern Azerbaijani literature, particularly prose and poetry dedicated to national struggle and independence, has significantly contributed to the formation of military-patriotic consciousness. Literary representations of soldiers, martyrs, and national heroes serve as moral and psychological models for cadets. These works emphasize responsibility, ethical conduct, and collective unity, which are core elements of national military ideology (Rəsulzadə, 1923/2013; Yusifli, 2020).

**The Role of Literature in Cadet Education**

Incorporating Azerbaijani literary works into cadet education enhances the ideological and psychological effectiveness of military training. Literature enables cadets to:

- emotionally experience historical and military events,
- internalize national values and moral norms,
- develop a sense of pride and belonging,
- strengthen motivation for military service (Janowitz, 1960; Siebold, 2007).

Through literary analysis and discussion, cadets gain deeper insight into the ethical dimensions of military duty and the human cost of defending the homeland.

**Literature and the Formation of Collective Military Identity**

National military ideology is reinforced through collective consciousness. Azerbaijani literature contributes to this process by constructing shared narratives of struggle, victory, and resilience. These narratives foster unity and cohesion within military collectives and help cadets perceive themselves as part of a historical and moral continuum (Smith, 1999; Siebold, 2007).

**National Military Ideology in the Context of Contemporary Challenges**

In the era of globalization and information warfare, the preservation of national military ideology has become increasingly important. Azerbaijani literature functions as an ideological safeguard against external cultural and psychological influences by reaffirming national values and historical truth. For cadets, literary engagement strengthens ideological immunity and reinforces commitment to national interests (Anderson, 2006; Hobsbawm, 1992).

**Conclusion**

National military ideology is a vital component of cadet education and military preparedness. Azerbaijani literature, as a repository of national memory and moral values, plays a decisive role in shaping this ideology. The integration of literary heritage into military education enhances ideological stability, psychological resilience, and ethical awareness among cadets. Consequently, Azerbaijani literature should be systematically incorporated into military-educational programs as an effective tool for fostering national military ideology and preparing ideologically grounded, morally resilient officers (Nizami Ganjavi, 1197/2008; Matthews et al., 2006; Yusifli, 2020).

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# PEDAGOGICAL SCIENCES

## INNOVATIVE APPROACHES TO TEACHING ENGLISH AS A FOREIGN LANGUAGE IN SECONDARY SCHOOLS: ENHANCING STUDENT ENGAGEMENT AND MOTIVATION

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**Abstract**
The rapid globalization of communication and the increasing importance of English in professional and academic domains have made effective English as a Foreign Language (EFL) instruction a critical component of secondary education. Traditional teacher-centered methods, often focused on grammar memorization and rote learning, have shown limited effectiveness in fostering student engagement and motivation. This paper explores innovative approaches to EFL teaching that actively involve learners and enhance motivation, including technology integration, communicative language teaching, project-based learning, gamification, and differentiated instruction. The study reviews recent research and practical applications, emphasizing the benefits of these strategies in promoting linguistic competence, learner autonomy, and long-term academic success. Findings suggest that incorporating innovative approaches in secondary school EFL classrooms results in higher engagement, better language acquisition outcomes, and more positive learner attitudes toward English learning.
**Keywords:** English as a Foreign Language, secondary education, innovative teaching, student engagement, motivation.

### 1. Introduction

English has emerged as a global lingua franca, integral to international communication, education, and professional opportunities. In secondary education, English instruction is not merely a curricular requirement but a foundational skill that can significantly impact students' future academic and professional success. Despite this, many secondary school students exhibit low motivation, limited engagement, and high levels of language anxiety in traditional EFL classrooms.

Historically, EFL instruction in secondary schools relied heavily on teacher-centered methods, including grammar-translation, rote memorization, and repetitive exercises. While these methods facilitate structural knowledge of the language, they often fail to provide meaningful communicative opportunities, reducing students' interest and active participation. Research indicates that passive learning environments correlate with lower achievement, diminished motivation, and increased dropout rates in language courses (Dörnyei, 2001).

Adolescents, in particular, require engaging and interactive learning experiences. They benefit from learner-centered strategies that acknowledge diverse learning styles, cognitive development, and social needs. Innovative approaches to EFL instruction, such as technology integration, communicative practices, project-based learning, gamification, and differentiated instruction, aim to address these challenges by fostering active participation, collaboration, and intrinsic motivation. This paper examines these methodologies, analyzing their potential to enhance both engagement and language acquisition in secondary school contexts.

### 2. Literature Review

#### 2.1 Student Engagement and Motivation

Student engagement is a multidimensional construct encompassing behavioral, emotional, and cognitive participation in learning activities (Fredricks, Blumenfeld, & Paris, 2004). Behavioral engagement involves active participation in classroom tasks; emotional engagement includes students' interest, enjoyment, and sense of belonging; cognitive engagement reflects learners' investment in understanding complex concepts.

Motivation, a critical determinant of language acquisition, influences learners' effort, persistence, and achievement. Gardner's socio-educational model posits that motivation includes integrative and instrumental components, both of which affect language learning outcomes (Gardner, 1985). Integrative motivation reflects a desire to integrate into the target language culture, while instrumental motivation is linked to pragmatic goals, such as career advancement.

Student engagement is not only a critical predictor of academic achievement but also a key factor influencing long-term language learning success. Behavioral engagement encompasses participation in class activities, completion of assignments, and active contribution to discussions. Emotional engagement involves students' interest, enthusiasm, and positive attitudes toward English learning, while cognitive engagement reflects the investment in understanding complex language concepts, employing learning strategies, and self-regulating study habits.

Research has shown that high levels of engagement correlate with increased language acquisition, greater retention of vocabulary and grammar, and improved oral and written communication skills (Fredricks, Blumenfeld, & Paris, 2004). In secondary school contexts, students often experience a gap between their intrinsic interests and the content delivered in traditional classrooms, resulting in lower engage-

ment. Therefore, innovative strategies that align instructional content with students' interests, real-life contexts, and social interactions are essential.

Motivation, closely linked to engagement, can be categorized into intrinsic and extrinsic types. Intrinsic motivation arises from personal interest, enjoyment, or the satisfaction of mastering a skill, whereas extrinsic motivation is driven by external factors such as grades, rewards, or recognition. Studies indicate that intrinsic motivation is particularly effective in promoting active participation and long-term language retention, as students are more likely to engage in voluntary practice and authentic communication when they find personal relevance in tasks (Dörnyei, 2001).

Furthermore, fostering a sense of learner autonomy significantly enhances motivation. When students are allowed to set personal goals, select learning activities, and reflect on their progress, they develop self-efficacy and a stronger commitment to learning. Peer collaboration also positively influences both engagement and motivation, as social interaction encourages accountability, constructive feedback, and the development of communicative competence.

Finally, emotional factors such as anxiety, confidence, and perceived competence play a crucial role. Classrooms that provide a supportive and low-anxiety environment, incorporate interactive activities, and celebrate small successes tend to promote higher engagement and sustained motivation. Innovative teaching strategies, as discussed in subsequent sections, directly address these psychological and social components to enhance overall student participation and commitment to learning English.

**2.2 Challenges in Traditional EFL Classrooms**

Conventional approaches often neglect active learning and communicative competence. Studies indicate that students in grammar-focused classrooms demonstrate low oral fluency, limited vocabulary application, and decreased enthusiasm for learning (Richards & Rodgers, 2014). These shortcomings underscore the necessity of adopting strategies that increase meaningful interaction, autonomy, and student-centered learning.

Traditional EFL classrooms often rely heavily on teacher-centered methods, such as the grammar-translation approach and rote memorization of vocabulary and grammatical rules. While these methods facilitate structural understanding of the language, they frequently fail to engage students in meaningful communication or to develop practical language skills. In secondary school settings, this results in passive learners who complete exercises mechanically without fully understanding or applying the language in real contexts.

One of the primary challenges in traditional classrooms is the lack of interaction and communicative practice. Students may be able to translate sentences or complete worksheets accurately, yet struggle with speaking or listening in authentic situations. This limitation is particularly evident among adolescents, who require social and collaborative experiences to remain motivated and actively engaged. Research has shown that classrooms emphasizing teacher-led instruction over student-centered tasks often experience lower levels of participation and increased anxiety during speaking activities (Richards & Rodgers, 2014).

Another significant challenge is the inability of traditional methods to address diverse learner needs. Secondary school classrooms typically include students with varying levels of proficiency, cognitive abilities, and learning styles. Teacher-centered approaches rarely provide differentiated support, which can lead to frustration among lower-level learners and boredom among more advanced students. This lack of differentiation undermines motivation and reduces overall engagement.

Time constraints and curriculum rigidity present additional challenges. Teachers are often required to cover a fixed syllabus within limited periods, leaving little room for interactive activities, projects, or personalized learning. As a result, students may perceive English learning as a repetitive and monotonous task, rather than an engaging, meaningful experience. Moreover, the assessment methods in traditional classrooms—focused primarily on grammar, vocabulary, and written exams—fail to evaluate oral proficiency, creativity, or collaborative skills, further discouraging active participation.

Finally, psychological factors such as language anxiety, fear of making mistakes, and low self-efficacy are exacerbated in traditional classrooms. When the focus is predominantly on error correction and strict performance evaluation, students become hesitant to communicate and experiment with language use. This negatively impacts both engagement and motivation, as learners are less willing to take risks necessary for authentic language acquisition.

In summary, traditional EFL classrooms face multifaceted challenges, including limited communicative opportunities, insufficient differentiation, rigid curricula, and psychological barriers. Recognizing these challenges is essential for implementing innovative teaching approaches that actively engage learners, accommodate diverse needs, and foster motivation for long-term language learning success.

2.3 Innovative Approaches in EFL

Innovative methodologies aim to address engagement and motivation challenges. Technology-enhanced learning, project-based activities, gamification, and differentiated instruction have emerged as effective strategies in secondary EFL contexts. Evidence suggests that such approaches not only enhance motivation but also improve learner autonomy, collaboration skills, and overall language proficiency (Harmer, 2007; Dörnyei, 2001).

**3. Innovative Teaching Strategies**

**3.1 Technology-Enhanced Language Learning**

Integration of technology in EFL classrooms facilitates access to authentic language input, interactive exercises, and real-world communication scenarios. Digital tools, including learning management systems, mobile applications, video-based tasks, and virtual discussion forums, promote collaborative and autonomous learning. Technology also enables personalized learning paths and immediate feedback, increasing both engagement and motivation. For example, online language games and multimedia tasks provide learners

with meaningful contexts for practicing grammar, vocabulary, listening, and speaking. Studies show that students using technology-enhanced tools demonstrate higher levels of participation and improved linguistic outcomes compared to traditional instruction (Godwin-Jones, 2018).

**3.2 Communicative Language Teaching (CLT)**

CLT emphasizes the practical use of language in real-life contexts. Classroom activities include role-plays, debates, information-gap tasks, and collaborative problem-solving exercises. By prioritizing communication over grammatical perfection, CLT reduces language anxiety and fosters confidence in oral expression.

Moreover, CLT encourages peer interaction, supporting social engagement and enhancing motivation. Secondary school learners, in particular, benefit from meaningful, interactive activities that make English relevant and engaging.

**3.3 Project-Based Learning (PBL)**

PBL involves extended, real-world projects requiring students to apply language skills collaboratively. Examples include research presentations, video productions, blog writing, and interviews. Projects integrate listening, speaking, reading, and writing, providing holistic language practice.

PBL enhances intrinsic motivation by allowing learners to pursue topics of interest, assume responsibility for learning, and experience tangible outcomes. This approach also develops higher-order cognitive skills, including critical thinking, problem-solving, and creativity.

**3.4 Gamification**

Gamification incorporates game elements such as points, badges, competition, and immediate feedback into learning activities. Gamified classrooms provide a stimulating, low-anxiety environment that encourages active participation.

Research demonstrates that gamification increases motivation, engagement, and perseverance in EFL learners (Domínguez et al., 2013). For secondary school students, gamified vocabulary quizzes, interactive storytelling, and team challenges make learning enjoyable and rewarding.

**3.5 Differentiated Instruction**

Secondary school classrooms are diverse, with varying proficiency levels, learning styles, and cognitive abilities. Differentiated instruction adapts tasks, content, and assessment methods to meet individual learner needs. Teachers can provide scaffolded support, tiered assignments, and flexible grouping to maintain engagement and motivation.

This inclusive approach ensures that all students experience success, fostering confidence and reducing frustration. Differentiated instruction has been shown to positively affect both academic outcomes and learner attitudes toward language learning (Tomlinson, 2014).

**4. Discussion**

The integration of innovative teaching strategies in secondary EFL classrooms addresses the limitations of traditional instruction. Technology-enhanced learning, CLT, PBL, gamification, and differentiated instruction collectively foster active participation, intrinsic motivation, and meaningful language use.

Implementing these strategies requires careful planning, teacher training, and resource allocation. Teachers must balance innovative activities with curriculum goals and assessment standards, ensuring alignment with educational objectives. Furthermore, the combination of multiple approaches such as CLT with gamified projects can maximize engagement and learning outcomes.

Research consistently indicates that students exposed to innovative methodologies demonstrate higher motivation, improved linguistic competence, and more positive attitudes toward English learning. These findings highlight the necessity for secondary schools to transition from passive, teacher-centered instruction toward dynamic, learner-centered pedagogues.

**5. Conclusion**

Innovative approaches to teaching EFL in secondary schools significantly enhance student engagement and motivation. Strategies such as technology integration, communicative activities, project-based learning, gamification, and differentiated instruction provide interactive, meaningful, and inclusive learning experiences.

By fostering learner autonomy, collaboration, and intrinsic motivation, these approaches contribute to improved language proficiency and positive learner attitudes. For secondary education, embracing innovative teaching strategies is essential to prepare students for global communication demands and lifelong learning.

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# PHILOLOGICAL SCIENCES

## NATIONAL MENTALITY AND ITS FEATURES

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**Abstract**
The differences between nations are due to their different historical destinies. In the modern world, it is necessary to realize the interrelationship of various national interests, since the national mentality permeates all spheres of society: culture, politics, science, everyday life, family, economy, etc. The mentality is based on a deep awareness of each person's belonging to their national community, which has its own traditions and customs, communication manners and ethical norms.

The history of each nation, as is well known, experiences a wide variety of turning points in its development, and it is precisely such events that determine the state of the national mentality that characterizes the character of the people. The greatness of a people is determined not by their age, but by the level of spirituality they have achieved and their specific contribution to human civilization. Some politicians inspire their people and openly declare to the whole world in the information space about the greatness and antiquity of their people and claim what never belonged to them, thereby acquiring a distinctive feature of their mentality. The mentality is brought up and absorbed by the people themselves, usually based on concrete positive examples, therefore the every people constantly take care of improving and enriching their spirituality.

**Keywords:** mentality, ethics. spirituality. historical memory, ethnic roots, the Azerbaijani people.

The topic that we are exploring about mentality and the specifics of mentality, in the context of community and differences among peoples, is very relevant. In the culture of every nation, there is always something universal, universal and, at the same time, specific, national and special, that unites people of an ethnic group. The differences between nations are due to their different historical destinies. A great contribution to the research of the mentality of peoples was made by the development of genetics, which made it possible to trace the history of entire peoples in the footsteps of individual fragments of the human genome.

The term "mentalities" was introduced into scientific use by the French ethnologist and socio-anthropologist L. Levy-Bruhl. The philosophical understanding of the concept of "mentalities" is associated with the name of the German thinker E.Cassirer, who put into the concept of "mentality" about the same content as L. Levy-Bruhl, emphasizing that types of mentalities can be systematized according to the ways of perceiving the world around them. The mentality has a contradictory nature and embodies the dual opposition of innovation and tradition. Both sides of the dual opposition of the mentality of innovation and tradition are necessary, and there must be a balance between them, a kind of balance.

In the modern world, it is necessary to realize the interrelationship of various national interests, since the national mentality permeates all spheres of society: culture, politics, science, everyday life, family, economy, etc. Throughout their history, nations have accumulated solid experience in nonviolent conflict resolution. The resolution of problems related to ethnic conflicts, clashes based on national hostility and a way out of these problems is possible with a consistent state policy. It should be emphasized that people of different nationalities can quite get along with each other if one nation does not put itself above the other and if it develops immunity to various harmful attempts to influence the minds of the younger generation by various nationalist movements.

The mentality of peoples also reflects a set of value orientations, the ability to feel and act in accordance with national interests. Absolutely opposite features can be found in each of the peoples, because the root of the character of a particular people grows from the subconscious of people. The mentality is based on a deep awareness of each person's belonging to their national community, identification with this community. Addressing the topic of mentality is one of the ways that deserves scientific analysis.

Basically, mentality is reflected in the actions of people, their way of thinking, which leaves its mark in folklore, literature, and the art of nations. Scientific and artistic literature, for example, of the Azerbaijani people, whose authors were the ancestors of today's Azerbaijanis, such as the philosopher Bahmanyar Al-Azerbaijani of the XI century, the philosopher and poet Nizami Ganjavi of the XII century, the philosopher and poet Nasimi of the XIV century and others, provides great information for studying the mentality of the Azerbaijani people. Although many representatives of Azerbaijani culture and science wrote in Farsi, Arabic, and Russian, depending on which conqueror the Azerbaijani people were, nevertheless, the specificity of the Azerbaijani mentality, which is based on its ancient Turkic language, has always been traced. The peculiarities of the historical fate of the Azerbaijani people, the economic, socio-political and cultural environment had a great influence on the formation of their mentality. The national mentality of the Azerbaijani people has its own peculiarities, since the root of mentality was formed in ancient times on the basis of Avestan teachings and Zoroastrianism, and much has been preserved in the mental character of the Azerbaijanis, but over time, coming under the influence of various conquerors

(Persians, Arabs, Russians), some changes occurred, as the conqueror imposed his state language, and even religion, as it was during the Arab conquest in the sixth century. The 30-year struggle of the ancestors of the Azerbaijanis, led by Zoroastrian Babek, against the Arab conquerors who taxed those who did not accept the new religion, nevertheless led to the fact that, having preserved their ancient traditions, the ancestors of the Azerbaijanis converted to Islam, embodying in their mentality the main goal - to be spiritual and believe in the power of the Almighty God. In Zoroastrianism, there has always been a five-time prayer (from sunrise until dark), and therefore the ancestors of the Azerbaijanis also continued all their traditions, performing ablutions, necessarily wearing belts, which were removed only during prayer and sleep, and performing worship five times a day to this day, only doing it in Arabic in the Islamic version. By the way, there are belts in Azerbaijani national clothes, but with the advent of Soviet power and the Europeanization of clothing, belts have disappeared, although in the wedding ceremony, before the wedding, the bride is always tied with a red belt in a wedding dress, which is a symbol of the strong figure and stability of the creator of a new family.

However, it should also be noted that prior to the Arab invasion, and even earlier, Alexander the Great, a conqueror seeking to enrich Greek culture, desired to not only appropriate the wealth of these lands but also incorporate their cultural achievements. He ordered the destruction of the Avesta and the execution of Zoroastrian clerics (magicians, commonly known as mugs). Despite the prohibitions imposed by Arab and other invaders, the observance of Novruz, a spring festival, and numerous other ancient customs, which remain the holiest traditions for Azerbaijanis since Zoroastrian times, has been preserved to the present day. Even when Azerbaijan was a part of the Soviet Union and the celebration of Novruz was prohibited by the Communist atheistic ideology as an archaic practice, the tradition remained deeply ingrained in the collective consciousness of Azerbaijanis, causing every family to continue to observe the holiday in secret, despite official condemnation.

Currently, there is a growing interest and desire among individuals and entire nations to preserve their ethnic heritage. This desire for identity preservation has become one of the primary factors leading to the dissolution of the Soviet Union, as it represents the pursuit of national independence.

Mentality, on the other hand, is a means by which individuals can identify with their social group and form social solidarity. It is based on a sense of belonging to a particular community, which is further enhanced by awareness of one's role within that community. The formation of this sense of social identity is influenced by both genetic factors and the natural and social environments in which an individual lives.

Mentality expresses its archetypal content through culture. It is defined by a cultural code, which is primarily carried by the intelligentsia.

The concept of "archetype" was introduced by Carl Gustav Jung in 1919, in his article "Instinct and the Unconscious". Jung sought to identify the units of influence that shape and determine the behaviors and experiences of humanity as a whole, as well as individuals. Jung defined the archetype as the unconscious content that becomes conscious and perceptible, undergoing changes under the influence of individual consciousness. Although mentality is generally conservative, it does change over time through people's experiences. Archetypes, meanwhile, were "imprinted" in the human psyche during the formation of humanity and are passed down unchanged from generation to generation. He believed that in order to gain a comprehensive understanding of the mental characteristics of a people, it is essential to examine their history, cultural background, significant traditions, customs and rituals [1, p. 274].

The mental disposition of individuals is closely intertwined with the societal underpinnings of the community, traditions and practices that form an integral part of the lives of those who belong to it. Typically, national customs have a strong and enduring presence in society, naturally permeating human consciousness. The perception that has been shaped may differ from that formed by representatives of another cultural background, yet there are unique aspects due to historical heritage. The mental makeup of each people is a persistent characteristic passed down to each new generation, with a historically prevalent emphasis on collectivism.

If we look at the historical process as a whole, then all the changes in the history of any nation had a long preparation in the sphere of the spirit of these peoples. Each new epoch gave rise to new spiritual values, which are guided by the public consciousness of the peoples. Each nation has its own face, its own culture, its own traditions, which hides its essence. Human behavior is mainly determined by norms, patterns, and values. Currently, there is a need for identification due to communication and information processes, and therefore some peoples want to distinguish their "I". Another thing is how they do it, for example, some nations want to show their superiority over other nations, and some do not need to advertise the mental achievements of their people, since there is no such trait in the national character to praise themselves.

Each state is home to representatives of not just one, but several ethnic groups, and therefore a fusion of cultures occurs, with the dominant ethnic group playing a dominant role. The language of each people is one of the essential characteristics of the ethnic group, an important component of its history and culture. Although peoples share many common words, each has developed its own language. Mentality is the result of birth, upbringing, indoctrination, and conscious persuasion, through which a person determines their ethnicity. In the history of the Azerbaijani people, the state language was most often the language of the country that enslaved them. Therefore, Azerbaijani poets, writers, and scholars wrote in Farsi, Arabic, and Russian (under Soviet rule), but works in Azerbaijani survive, such as those by Nasimi (14th century) and others.

Spiritual culture is of great importance for nations, which permeates all aspects of social interaction between people, creating a sense of unity. The mentality of a society, even of one nation, is heterogeneous. The spiritual elite develops higher culture on the basis of mass culture. Later, by introducing the meanings of

higher culture into the mass consciousness through the intelligentsia, it enriches the mass mentality, which becomes capable of striving to maintain the establishment of more progressive social relations. This is the interaction of the mentality of the spiritual elite and the mentality of the masses.

The spiritual world regulates the activity (communication, behavior, activity) of the subject as a whole, and the mentality within the spiritual world determines the specific nature of this activity. Ethnic mentality is the most important component of ethnic consciousness. images and attitudes specific to each ethnic group, behaviors and attitudes towards the world, nature, man, his "ethnic group" and other peoples ("we" and "they"). Since these features in the culture of an ethnic group pass from generation to generation, they turn into fairly stable traditions, they become stable stereotypes of people's thinking and behavior. The process of formation of an ethnic mentality is continuously connected with the general process of becoming a person, forming him as a personality. According to the behavior and actions of a person as a person, one can judge her spiritual and moral qualities (both positive and negative).

The mentality of the people and the historical memory of the people have common and distinctive characteristics. Historical memory is a system-forming element of public consciousness with its inherent mechanism of imprinting, storing, reproducing sociocultural information and represented as a system of traditions, customs, etc. passed down from generation to generation. Mentality and historical memory reflect a generalized national and cultural peculiarity of the people. They carry collective principles, and reproduce from generation to generation all the accumulated experience of mankind. Mentality and historical memory are the main indicator of the integrity and unity of the entire nation.

The memory of the people preserves the knowledge that a person acquires in his individual experience, makes it possible to use them expediently when one generation is replaced by another. History, as you know, is experiencing a wide variety of turning points in its development. The life of any nation takes place in close interaction with this diverse, mysterious world. In the current scientific, technical and information space, any people cannot unequivocally assert that their self-sufficient life is provided only at home, without direct invisible outside interference.

If the mentality of a people is in constant humiliation and dependence, but lives by a lofty idea based on the true history of their people, then they achieve freedom and development for their people. And in extreme situations, the national spirit turns into a kind of magical magic force, since the spirit of the people rises when it represents a single integrity. For example, starting in the 90s of the twentieth century, for 30 years, the Republic of Azerbaijan tried to peacefully return part of the Azerbaijani lands seized by Armenian extremists, but since the world community was informed in the information space by fakes about the "antiquity of the Armenian people", etc., therefore, it was difficult for Azerbaijanis to receive support from any country. Officially, no country has recognized the lands of Azerbaijan occupied by Armenian extremists, as according to documents and in fact, the ancestors of Azerbaijanis have always lived on these lands. And when it was not possible to return their lands through years of peaceful negotiations, then the Azerbaijani people united and, under the guidance of the wise policy of their President Ilham Aliyev, were able to defeat the Armenian aggressor. Currently, the Azerbaijani people are building houses and restoring all the systems that were destroyed by the Armenian aggressors over 30 years. Azerbaijani families who were driven out by armed means then will now be able to return to their liberated homelands of Azerbaijan. The mentality of an individual cannot be separated from the mentality of his people. A man cannot be indifferent to the troubles of his people. E. Fromm tried to comprehend the nature of the national mentality, its connection with the characteristics of socio-cultural existence in his works. Through the disclosure of the social potential of a national character, he explained many of the social transformations taking place in society [2, p.178].

People have a sense of national pride. But the mentality of different nations understands national pride in different ways. The antiquity of a people is not the main criterion of its greatness and sanctity. Although the Azerbaijani people have been formed on the ancestral lands of Azerbaijan since the Zoroastrian times, and have benevolence and hospitality in their national character, they never brag about it, as Armenian politicians do in the Internet information space. The greatness of a people is determined not by their age, but by the level of spirituality they have achieved and their specific contribution to human civilization. Any nation can admire its ancient and distinctive culture, but the level of civilization is determined by the current level of development of society. Armenian politicians inspire their people and the whole world in the information space about the greatness and antiquity of their people, and also cause self-pity by claiming that there was an alleged genocide of Armenians in Ottoman Turkey in 1915, which in fact did not happen, and this fairy tale was invented only in 1962 by the special services of the Soviet Union, in order to to use against Turkey.

Every nation should develop comprehensively economically, scientifically, and spiritually. In order to raise the spirit of the people, it is necessary to recognize their very essence with the true story of their people, and not an invented one. The spirit is nurtured and absorbed by the people themselves, at least by their absolute majority, and with concrete positive examples. The people who have a healthy spirit will always achieve the best results for development. The spirit rises when the blessed self-sufficient life of the people is ensured, when people look to their future with honor and faith. The national spirit is organically woven into the fabric of state power and valor.

In the historical past, different nations had glorious pages. They are associated with the achievements of material and spiritual culture, which aroused and still arouse the admiration of many nations. The historical path of each nation is the emergence and establishment of national traditions and customs, the attitude to which is ambiguous. In the mentality of many nations, there is a good tradition of hospitality, a glorious tradition of

helping other nations in trouble. In particular, the Azerbaijani people are famous all over the world for their hospitality, as anyone who has ever visited Azerbaijan, where people of many nationalities live together, can confirm. The Azerbaijani people also showed their hospitality when, in the early 19th century, after several Azerbaijani khanates fell under the rule of tsarist Russia and several other khanates came under the rule of Iran (after the Russian-Iranian war), a large number of people of Armenian nationality were resettled from Iran and Ottoman Turkey to the lands where Azerbaijanis lived, to increase the number of people of the Christian religion. They were literally attached to all Azerbaijanis, and from there came Armenian surnames with Azerbaijani names and words ending in yang, which means "near" whom they live or "what they do". And then the local Azerbaijanis treated the Armenian settlers who arrived with understanding, helped them with food, clothes, and gave them the opportunity to earn money, since the Russian Empire paid them each only a small amount of money for a short time. But in the future, these Armenian settlers and their descendants, at turning points in history, tried to appropriate the lands of Azerbaijanis, taking advantage of the opportunities. This was the case after the Socialist Revolution, for example, in 1918, gangs of Armenian terrorists killed hundreds of civilians of various nationalities in several cities of Azerbaijan, and this was the case during the collapse of the USSR in the 90s of the twentieth century. And nowadays, in the information space of the Internet, it is easy to meet the fantasies of Armenian politicians that their country should stretch "from sea to sea" and that they are "the most ancient people in the world".

Modern Azerbaijan is a multinational country, having received a rich heritage from generation to generation, enriched its mentality with spirituality and knowledge that lead to progress. The mentality of Azerbaijanis, combining spirituality with Islamic flavor and ancient traditions from the Zoroastrian times (celebrating Novruz), has a tolerant character in its national way of life. The mentality of the Azerbaijani people has always been in favor of cultural synthesis, because Azerbaijan has historically been at the crossroads of various world cultures.

In every country, the mentality of every nation has traditions and customs of communication and ethics. Love for loved ones, pain at their loss, are a universal human trait and do not turn out to be something specific for some and absent from other communities. The universal human principle usually overcomes the inertia of traditions anchored in the mentality.

The mentality ensures the connection of times and the continuity of generations. Mentality is transmitted mainly through the mechanisms of mass consciousness and ensures the unity of the spiritual sphere in its development, and therefore the new generation in the process of socialization perceives the mentality of their society. G. Shpet in his work "Introduction to Ethnic Psychology" concluded that the key to understanding the mentality of a people lies in its history, in the specific structure of social reality, embodying the "collective spirit of the nation" [3, p. 190].

The mentality of each nation is unique in its own way, and it can be said that there are no "bad" and "good" nations, since there are sane people in every nation who can lead their people on the right path. Currently, against the background of global processes in the world, it is important to correctly identify the mental characteristics of each nation in order to avoid possible interethnic clashes and conflicts. For this, there is a need for a comprehensive study of the national mentality: it is especially important to scientifically predict how a particular mental property may determine the behavior of a people or its individual representatives in a particular cultural and historical situation.

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# ORIGIN AND SEMANTICS OF LAUDATIVE AND PEJORATIVE CONCEPTS

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**Abstract**

This article examines the origin, semantic structure, and evolutionary patterns of laudative and pejorative concepts in natural language. Through analysis of semantic change processes, particularly amelioration and pejoration, this study explores how words acquire positive or negative connotations over time and what mechanisms drive these transformations. Drawing upon theoretical frameworks from historical linguistics, semantics, and pragmatics, the research demonstrates that laudative and pejorative terms constitute parallel yet asymmetrical linguistic phenomena shaped by sociocultural values, cognitive processes, and communicative needs. The investigation reveals that pejoration occurs more frequently than amelioration, reflecting a general human tendency toward negative bias in language evolution. However, both processes serve essential communicative functions, enabling speakers to express evaluation, construct social identities, and negotiate power relations. Through examination of specific lexical items and their semantic trajectories, this article establishes that the boundary between laudative and pejorative meaning is neither fixed nor universal but rather emerges through complex interactions between linguistic structure, social practice, and cultural ideology. The findings contribute to understanding how evaluative language operates as a dynamic system responsive to changing human attitudes and social conditions.

**Keywords:** laudative, pejorative, semantic change, amelioration, pejoration, evaluative language, connotation, semantic shift, linguistic evolution, pragmatics.

## Introduction

Language serves not merely as a neutral vehicle for describing reality but as an active instrument through which speakers express attitudes, construct identities, and negotiate social relationships. Central to this evaluative dimension of language are laudative and pejorative concepts—linguistic expressions that convey positive or negative judgments about their referents. While humans communicate factual information through denotative meaning, they simultaneously encode emotional stance, moral evaluation, and social positioning through connotative dimensions of language. Understanding how words acquire and maintain laudative or pejorative force represents a fundamental challenge for linguistic theory and practice.

The study of laudative and pejorative language intersects multiple linguistic subdisciplines: semantics investigates the meaning structures these terms encode; pragmatics examines how context shapes their evaluative force; sociolinguistics explores their role in constructing social identities and hierarchies; and historical linguistics traces their evolution over time. [1] This interdisciplinary nature reflects the complexity of evaluative language, which cannot be adequately understood through any single theoretical lens but requires integration of multiple perspectives.

Historically, the systematic study of semantic change emerged in the nineteenth century, though observations about shifting word meanings date to classical antiquity. Early scholars recognized that words undergo transformations in their evaluative orientations, with some terms becoming more positive (amelioration or elevation) and others more negative (pejoration or degradation) over time. [2] These processes constitute fundamental mechanisms of language change, operating continuously throughout linguistic history and reflecting evolving sociocultural values, cognitive biases, and communicative strategies.

Contemporary research has revealed that laudative and pejorative terms exhibit distinctive semantic properties that distinguish them from neutral descriptive language. Rather than simply expressing factual propositions, these terms encode complex evaluative stances, trigger emotional responses, and perform social actions such as praising, insulting, elevating, or demeaning their targets. [3] The semantic structure of such terms involves multiple layers: referential content that identifies what is being discussed, evaluative content that expresses judgment, and often prescriptive content that implicitly recommends particular attitudes or behaviors toward the referent.

This article provides a comprehensive examination of laudative and pejorative concepts, addressing several interconnected questions: What semantic properties characterize laudative and pejorative terms? How do words acquire positive or negative connotations through the processes of amelioration and pejoration? What cognitive, social, and cultural factors drive these semantic transformations? What is the relationship between laudative and pejorative language, and are they truly symmetrical opposites? How do evaluative meanings operate in actual communicative contexts? Through engagement with theoretical frameworks and empirical examples, this study aims to illuminate the nature and dynamics of evaluative language as a central component of human linguistic capacity.

## Main Part

Laudative language encompasses expressions that convey positive evaluation, approval, admiration, or praise toward their referents. The term derives from the Latin *laudare*, meaning "to praise." Laudative terms operate across multiple grammatical categories—adjectives such as *excellent*, *admirable*, and *heroic*; nouns like *champion*, *genius*, and *saint*; and verbs including *excel*, *triumph*, and *flourish*. These expressions do not simply describe neutral properties but encode positive judgment and typically invite hearers to share favorable attitudes toward what is discussed.

The semantic structure of laudative terms involves several components. First, they possess descriptive content that identifies certain properties or characteristics of their referents—intelligence, beauty, courage, skill, or other valued attributes. Second, they carry evaluative content that marks these properties as desirable, admirable, or commendable according to relevant cultural standards. Third, many laudative terms imply prescriptive force, suggesting that the qualities they describe merit appreciation, emulation, or reward. For instance, calling someone *courageous* not only attributes a disposition to face danger but also commends this trait and implicitly recommends it as worthy of cultivation and respect.

Laudative meaning often emerges through a process called amelioration or semantic elevation, whereby words that originally possessed neutral or even negative connotations develop increasingly positive meanings over time. This transformation reflects changing cultural values, social attitudes, and communicative practices. Words like *nice* (originally meaning "ignorant" or "foolish" in Latin), *terrific* (originally "terror-inducing"), and *pretty* (originally "cunning" or "crafty") have all undergone amelioration, shifting from neutral or negative senses to their contemporary positive meanings. [4] Such shifts demonstrate that laudative force is not inherent in linguistic forms but emerges through historical processes shaped by how speakers use words in particular social contexts.

Pejorative language, conversely, comprises expressions that convey negative evaluation, disapproval, contempt, or disparagement. The term derives from Latin *peior*, meaning "worse." Pejorative terms span various linguistic forms: adjectives like *terrible*, *wretched*, and *deplorable*; nouns such as *villain*, *coward*, and *fool*; verbs including *fail*, *deteriorate*, and *corrupt*. These expressions encode negative judgment and typically function to lower the status, reputation, or perceived value of their referents.

The semantic complexity of pejoratives parallels that of laudatives but with opposite valence. Pejoratives possess descriptive content identifying certain properties, evaluative content marking these properties as undesirable or contemptible, and often prescriptive content implying that what is described merits criticism, avoidance, or sanction. [5] Beyond these semantic dimensions, many pejoratives carry additional pragmatic force, functioning not merely to describe but to perform social actions such as insulting, excluding, or subordinating their targets. The utterance of a pejorative can constitute an act of verbal aggression that harms its target regardless of whether the descriptive content is accurate.

Pejoration—the process by which words acquire increasingly negative connotations—represents one of the most common types of semantic change. Numerous words that once possessed neutral or even positive meanings have deteriorated into negative terms. The word *silly*, for example, originally meant "blessed" or "innocent" in Old English but gradually shifted through meanings of "pitiable" and "simple-minded" to its contemporary sense of "foolish." [6] Similarly, *awful* once meant "inspiring awe" (parallel to *awesome*) but has become predominantly negative. These transformations often reflect social processes such as euphemism cycling, where neutral substitute terms gradually absorb the negativity associated with what they replace, or prejudice, where terms associated with devalued groups acquire negative connotations through social stigmatization.

*The Semantic Parallel and Asymmetry of Laudative and Pejorative Concepts*

Laudative and pejorative concepts constitute parallel evaluative systems, representing opposite ends of an evaluative continuum. Both involve complex semantic structures combining descriptive, evaluative, and prescriptive dimensions. Both emerge through diachronic processes of semantic change driven by sociocultural factors. Both serve pragmatic functions beyond mere description, performing social actions and constructing interpersonal relationships. In these respects, they mirror each other as complementary aspects of language's evaluative capacity.

However, the relationship between laudatives and pejoratives is not perfectly symmetrical. Empirical research on semantic change demonstrates that pejoration occurs considerably more frequently than amelioration—words more commonly deteriorate in meaning than improve. [7] This asymmetry appears to reflect cognitive and social biases. Psychologically, humans exhibit negativity bias, attending more strongly to negative information and remembering it more vividly than positive information. Socially, language often becomes a site for expressing and perpetuating prejudices, with terms associated with stigmatized groups readily acquiring negative connotations. Additionally, the euphemism treadmill effect—whereby polite substitute terms gradually become tainted by association with what they replace—systematically generates pejoration while providing fewer mechanisms for amelioration.

The pragmatic contexts and social functions of laudatives and pejoratives also differ in important respects. Pejoratives frequently operate as instruments of social exclusion, hierarchy construction, and verbal aggression, wielding disproportionate power to harm their targets. The utterance of a slur or insult can inflict genuine psychological damage and reproduce systems of oppression. Laudatives, while capable of manipulation through flattery or strategic praise, generally pose fewer risks of direct harm. This asymmetry in social consequences means that the ethical dimensions of laudative and pejorative language require different considerations, with pejoratives demanding particular scrutiny regarding their potential for violence and discrimination.

*Mechanisms of Semantic Change: Amelioration and Pejoration*

Amelioration, also termed semantic elevation or melioration, refers to the diachronic process whereby a word's meaning shifts toward more positive evaluation. This transformation may involve movement from negative to neutral, neutral to positive, or negative to positive valence. The change typically proceeds gradually, with periods of polysemy during which both older and newer meanings coexist before the positive sense eventually predominates or entirely displaces earlier meanings.

Classic examples of amelioration include the evolution of *nice*. In Latin, *nescius* meant "ignorant" or "not knowing." Through Old French, the word entered English with meanings including "foolish," "wanton," and "strange." During Middle English, *nice* acquired senses of "fastidious" or "precise," exhibiting slight positive movement. By Early Modern English, it had developed connotations of "agreeable" and "pleasant," culminating in its contemporary strongly positive meaning of "attractive, kind, or enjoyable." This centuries-long trajectory illustrates how amelioration can fundamentally transform a word's evaluative orientation. [8]

Another instructive case involves *knight*. The Old English term *cniht* simply meant "boy" or "servant"—a socially neutral or even lowly designation. With the development of medieval feudalism and chivalric culture, the term came to refer to a specific social rank of warrior aristocrats, eventually acquiring strongly positive connotations of honor, bravery, and nobility. This semantic elevation accompanied and reflected dramatic social changes in the status and cultural valuation of the referent group.

Several mechanisms drive amelioration. First, cultural revaluation of the referent occurs when societies come to view more positively whatever a term denotes. As social attitudes shift—perhaps through moral progress, changed aesthetic sensibilities, or altered economic relations—words associated with newly valued phenomena may undergo corresponding elevation. Second, semantic bleaching and intensification can contribute to amelioration, as when words lose their literal force and come to function as general intensifiers or marks of approval. Third, deliberate language reclamation represents a conscious form of amelioration whereby stigmatized groups appropriate terms previously used to oppress them, investing these words with positive meanings as acts of empowerment and resistance.

Pejoration, also known as semantic deterioration or degradation, constitutes the opposite process: the diachronic shift of meaning toward increasingly negative evaluation. This extremely common form of semantic change reflects various cognitive and social mechanisms that systematically degrade word meanings over time.

The trajectory of *villain* exemplifies classic pejoration. Originally from Latin *villanus*, meaning "farmworker" or "person from a village," the term entered English as a neutral designation for agricultural laborers. During medieval times, as social hierarchies crystallized, the term acquired class-based negative associations, suggesting lack of refinement or noble birth. Eventually, *villain* came to denote moral depravity, meaning "wicked person" or "scoundrel"—a complete transformation from neutral occupational term to strong pejorative. This semantic journey reflects how social prejudice inscribes itself in language, with words associated with lower-status groups absorbing contemptuous connotations.

Similarly, *lewd* has undergone dramatic pejoration. In Old English, *lǣwede* meant simply "lay person" or "non-clergy," without negative force. The term then shifted to mean "unlettered" or "uneducated," introducing slight negative evaluation. Subsequently, it developed moral connotations, coming to suggest lack of moral education and propriety, eventually arriving at its current meaning of "crude" or "sexually inappropriate." This progression demonstrates how pejoration can dramatically narrow and negatively transform semantic content.

Multiple factors motivate pejoration. The euphemism treadmill or cycle represents a powerful mechanism: when speakers create neutral substitute terms for negatively valenced concepts (death, bodily functions, stigmatized conditions), these euphemisms gradually absorb the negativity associated with their referents, becoming pejoratives themselves and necessitating new euphemisms in a continuous cycle. [9] For example, terms for cognitive disabilities have repeatedly undergone this process, with medical terms like *moron*, *imbecile*, and *retarded* entering language as neutral classifications but deteriorating into insults, prompting replacement by new neutral terms that themselves eventually pejorated.

Social prejudice and discrimination constitute another major source of pejoration. Words associated with devalued social groups—women, ethnic minorities, lower classes, marginalized sexualities—systematically acquire negative connotations through what might be termed semantic contamination. Terms used to describe or address women have proven particularly susceptible to pejoration, reflecting pervasive gender-based prejudice. Words like *mistress*, *hussy* (originally "housewife"), and *madam* have all deteriorated from neutral or respectful terms to negative or sexually stigmatized meanings.

Frequency effects also contribute to pejoration through semantic weakening. Words used for emphasis or intensification tend to lose their original strong meanings through overuse, often sliding toward negative or merely intensifying functions. This process helps explain how *awful* (originally "full of awe") and *terrible* (originally "inspiring terror") became general pejoratives despite their etymologically sublime origins.

Comparing amelioration and pejoration reveals important asymmetries in semantic change. Pejoration occurs far more frequently, proceeding through multiple well-established mechanisms (euphemism cycling, prejudicial contamination, semantic weakening) while amelioration operates through fewer, less systematic processes. This imbalance suggests that language change exhibits negativity bias, paralleling documented psychological tendencies to weight negative information more heavily than positive information.

The social contexts of these processes also differ. Pejoration often operates unconsciously, emerging from implicit prejudices and communicative patterns without deliberate intention. Amelioration, conversely, frequently involves conscious effort—language reclamation by marginalized groups, deliberate cultural revaluation, or planned terminology reforms. This distinction implies that maintaining neutral or positive meanings requires active work while negative drift occurs through passive linguistic and social dynamics.

Nevertheless, amelioration does occur and serves important functions. It provides linguistic resources for expressing evolving positive values, enables communities to construct affirming identities, and facilitates progressive social change by making available language that valorizes previously stigmatized characteristics or groups. The existence of amelioration demonstrates that semantic change, though biased toward negativity, remains ultimately responsive to human agency and cultural transformation.

*Cognitive and Sociocultural Foundations*

The generation and perception of laudative and pejorative meaning engage fundamental cognitive processes. Categorization represents a primary mechanism: humans constantly classify entities, events, and properties as good or bad, desirable or undesirable, acceptable or unacceptable. Language provides the symbolic tools for expressing and transmitting these evaluative categorizations, with laudative and pejorative terms serving as linguistic markers of positive and negative categories.

Conceptual metaphor theory, developed by George Lakoff and Mark Johnson, offers insights into how evaluative meaning structures thought and language. Orientational metaphors such as UP IS GOOD and DOWN IS BAD provide conceptual scaffolding for evaluative language, with words and expressions drawing on spatial schemas to encode value judgments. Amelioration often involves metaphorical movement upward or toward light, while pejoration involves downward or darkening metaphors. These mappings appear grounded in bodily experience—upright posture with health and vitality, downward orientation with sickness and death—illustrating how evaluation emerges from embodied cognition.

Prototypes and stereotypes shape laudative and pejorative categorization. Rather than operating with necessary and sufficient conditions, humans use prototypical exemplars to anchor categories, with other members judged by similarity to prototypes. When social groups become associated with negative prototypes through prejudice, words denoting group members readily acquire pejorative force. Conversely, positive prototypes enable laudative meanings. Understanding evaluative language thus requires attending to the prototype effects that structure human categorization.

Emotional and affective dimensions prove central to laudatives and pejoratives. These terms do not simply describe neutral properties but encode and evoke emotional responses—admiration, contempt, pride, disgust. The affective potency of evaluative language connects to its pragmatic force: calling someone a *hero* or *villain* does not merely classify them but expresses and invites particular emotional stances that motivate action. Neuroscientific research suggests that processing pejorative language activates brain regions associated with emotional processing and threat detection, demonstrating the deep cognitive embodiment of evaluative meaning.

Beyond cognitive universals, the specific content and trajectory of laudative and pejorative terms reflect particular sociocultural contexts. Values, ideologies, and power relations profoundly shape what qualities merit praise or condemnation, which groups receive positive or negative linguistic treatment, and how evaluative meanings change over time.

Cultural values determine which properties receive positive or negative linguistic encoding. Individualist cultures may generate laudatives emphasizing autonomy, achievement, and self-expression, while collectivist cultures may foreground cooperation, harmony, and group loyalty. Masculine-coded cultures tend toward laudatives emphasizing strength, dominance, and rationality, while more feminine-coded cultures may valorize nurturance, empathy, and emotional expressiveness. These value orientations inscribe themselves in languages through differential elaboration of evaluative vocabulary and through what terms undergo amelioration or pejoration.

Power relations systematically influence evaluative language. Groups with greater social power tend to define evaluative standards, determining what counts as laudable or pejorative. Dominant groups' self-descriptors resist pejoration while subordinate groups' terms readily deteriorate. This dynamic appears clearly in gender-related language: masculine-coded terms like *confident*, *assertive*, and *ambitious* maintain positive meanings while feminine-coded or female-associated terms frequently pejorated (*shrill*, *bossy*, *hysterical* all carrying gendered negative force). [10] Such patterns reflect and reproduce gender hierarchies through linguistic means.

Historical changes in social structure drive semantic change in evaluative vocabulary. The democratic revolutions that transformed European societies affected meanings of class-related terms, with aristocratic descriptors sometimes undergoing pejoration (*haughty*, *imperious*) while terms associated with common people occasionally ameliorated (*civil*, from Latin *civilis* related to citizens). Economic transformations similarly reshape evaluative language: the rise of capitalism generated new laudatives for entrepreneurial activity while terms associated with pre-capitalist economic relations sometimes deteriorated.

Language ideologies—beliefs about proper language use and meaning—also shape evaluative semantics. Prescriptivist attitudes about correct language can influence which meanings prevail when words exhibit polysemy. Movements for inclusive language deliberately promote amelioration of terms associated with marginalized groups while challenging pejoratives. Political correctness debates often center on evaluative language, with conflicts about whether particular terms function as laudatives, pejoratives, or neutral descriptors reflecting deeper ideological disagreements about social justice and equality.

*Pragmatic Functions and Contextual Variation*

Laudative and pejorative terms perform speech acts—they do things with words beyond merely describing states of affairs. J.L. Austin's speech act theory and John Searle's subsequent developments provide frameworks for analyzing how evaluative language functions pragmatically. Laudatives typically perform expressive speech acts (expressing approval, admiration, or appreciation) and often commissive acts (committing the speaker to positive regard for the target). They may also function as directives (implicitly recommending that hearers adopt similar positive attitudes) or

declarations (officially conferring praise or recognition in institutional contexts like awards ceremonies).

Pejoratives likewise perform multiple illocutionary acts. They express negative attitudes but may additionally function as verdictives (delivering negative judgments), exercitives (exercising power to lower status), or even directives (commanding disrespect or exclusion). Ethnic, racial, and gender slurs exemplify how pejoratives can constitute performative violence, harming targets through their mere utterance regardless of speaker intentions or truth conditions. The injurious force of such terms exceeds their descriptive content, operating at the level of social action.

The perlocutionary effects—actual consequences on hearers—of laudatives and pejoratives extend beyond illocutionary force. Laudatives may successfully generate pride, motivation, or solidarity in addressees but could also provoke embarrassment, suspicion of flattery, or resentment from excluded others. Pejoratives may effectively wound, intimidate, or anger their targets while simultaneously creating in-group bonding among those who deploy them against outsiders. Understanding evaluative language requires attending to these complex effects that vary across contexts and participants.

The evaluative force of terms proves highly context-sensitive, with the same expression functioning laudatively, pejoratively, or neutrally depending on situational factors. Consider *aggressive*: in business contexts, it often functions as a laudative describing valued assertiveness ("an aggressive sales strategy"), while in interpersonal contexts it typically functions as a pejorative ("aggressive behavior"). Similarly, *ambitious* may praise determination and drive or criticize overreaching and ruthlessness depending on speaker attitudes and contextual framings.

Register and audience shape evaluative meaning. In-group uses of potentially pejorative terms may signal solidarity and affection, while out-group deployment of identical terms constitutes insult and aggression. African Americans' appropriation of the N-word as a term of affiliation exemplifies this dynamic, with the term's evaluative force depending entirely on who uses it toward whom in what context. Such reclamation represents strategic amelioration within specific speech communities while the term maintains pejorative force in other contexts.

Prosody, gesture, and facial expression modulate evaluative meaning in spoken language. Sarcasm and irony enable speakers to use apparently laudative terms with pejorative intent or vice versa, with vocal cues signaling the evaluative reversal. Written language lacks these paralinguistic channels, making evaluative intent sometimes ambiguous in text-based communication. Emoticons, punctuation, and metalinguistic commentary ("so-called," scare quotes) serve as compensatory mechanisms to clarify evaluative stance in writing.

Genre conventions influence acceptable evaluative language. Academic discourse typically demands hedged, measured evaluation, avoiding extreme laudatives or pejoratives. Political rhetoric deploys evaluative language strategically, with partisans using laudatives for allies and pejoratives for opponents. Informal conversation permits freer use of evaluative terms including creative profanity and playful insults. Marketing discourse systematically employs laudatives while avoiding pejoratives. Understanding evaluative language requires genre awareness alongside semantic and pragmatic knowledge.

*Theoretical Perspectives on Evaluative Semantics*

A central question in semantic theory concerns whether the evaluative content of laudatives and pejoratives contributes to truth conditions—the circumstances under which sentences containing these terms would be true or false. Traditional truth-conditional semantics would analyze "John is courageous" as true if and only if John possesses the property of courage, treating the laudative force as secondary to descriptive content. However, this approach struggles to explain why substituting a neutral synonym ("John is unafraid of danger") preserves truth conditions but loses evaluative meaning.

Non-truth-conditional or expressivist approaches treat evaluative meaning as lying outside truth-conditional content. On this view, laudatives and pejoratives express speakers' emotional attitudes or prescriptive stances without asserting truth-evaluable propositions. This captures the affective and prescriptive dimensions of evaluative language but faces challenges explaining how such terms can be embedded in truth-functional constructions like conditionals and negations while preserving their evaluative force.

Hybrid theories attempt to capture both dimensions, proposing that laudatives and pejoratives encode both truth-conditional descriptive content and non-truth-conditional evaluative content.[^11] Under such approaches, "courageous" both describes a property (disposition to face danger) and expresses approval of this property. This dual-aspect view acknowledges the semantic complexity of evaluative terms while maintaining that they contribute to propositional content in systematic ways.

Moral philosophers' discussions of "thick concepts" offer relevant insights. Thick concepts like *cruel*, *kind*, *courageous*, and *just* combine descriptive and evaluative elements inseparably—one cannot apply these terms without simultaneously describing and evaluating. Bernard Williams argued that such concepts prove more fundamental to moral thought than thin purely evaluative terms like *good* or *bad*, with thick evaluative concepts shaping how humans perceive and navigate social reality.

The thick concept framework suggests that many laudatives and pejoratives function as irreducibly evaluative-descriptive hybrids rather than neutral descriptions with added evaluative flavoring. The evaluative and descriptive dimensions co-determine meaning, making it impossible to extract pure factual content from these terms. This implies that evaluative language is not secondary to but constitutive of how humans conceptualize and communicate about the social world. However, the thick concept approach faces challenges explaining semantic change. If evaluative and descriptive content truly fuse inseparably, how do we account for amelioration and pejoration, where evaluative valence shifts while descriptive content remains relatively

stable? Perhaps thick concepts prove more "loosely woven" than pure fusion models suggest, allowing some independent variation in their evaluative and descriptive strands even while these remain substantially interconnected.

**Conclusion**

The examination of laudative and pejorative concepts reveals evaluative language as a complex, dynamic system central to human communication. These terms do not simply label pre-existing positive and negative properties in the world but actively construct evaluative categories through which speakers interpret experience, express attitudes, negotiate identities, and exercise social power. Understanding laudatives and pejoratives requires integrating semantic, pragmatic, cognitive, and sociocultural perspectives, as their meanings and functions emerge from interactions across all these dimensions.

The diachronic processes of amelioration and pejoration demonstrate that evaluative meaning proves remarkably fluid, with words continuously shifting along evaluative continua in response to changing cultural values, social structures, and communicative practices. The greater frequency of pejoration compared to amelioration reflects systematic biases—psychological negativity bias, social prejudices that contaminate language, euphemism cycling—that shape language evolution. Yet amelioration also occurs, often through conscious efforts at language reclamation or cultural revaluation, demonstrating that semantic change remains responsive to human agency even while constrained by cognitive and social forces. Theoretically, laudatives and pejoratives challenge simplistic models of meaning, requiring frameworks that can accommodate their multi-dimensional semantic structure combining descriptive, evaluative, and prescriptive content; their context-sensitive pragmatic functions; their deep entanglement with emotion and social action; and their historical mutability. Neither purely truth-conditional nor purely expressivist approaches fully capture how these terms operate, suggesting the need for integrative theories that recognize evaluative language as irreducibly complex.

The practical and ethical implications of understanding laudative and pejorative language extend beyond academic linguistics. In domains ranging from political discourse to educational practice, from media representation to interpersonal communication, evaluative language shapes perception, influences action, and distributes recognition and stigma. Awareness of how laudatives and pejoratives function—their semantic structures, their pragmatic effects, their susceptibility to manipulation—enables more critical and responsible language use.

Future research might productively explore several directions: cross-linguistic investigation of whether patterns of amelioration and pejoration prove universal or culture-specific; neurolinguistic studies examining the cognitive processing of evaluative meaning; computational approaches tracking semantic change in evaluative vocabulary across large corpora; and intersectional analyses of how multiple dimensions of identity (race, gender, class, sexuality) interact in shaping pejorative and laudative language. Additionally, applied research on interventions to combat harmful pejoratives and promote inclusive language could contribute to social justice while advancing theoretical understanding.

Ultimately, the study of laudative and pejorative concepts illuminates how language serves not merely as a mirror reflecting reality but as a tool actively shaping human social worlds. Through evaluative vocabulary, speakers classify and judge, include and exclude, praise and condemn, constructing shared meanings and contested values. As long as humans use language to navigate social life, laudatives and pejoratives will remain vital components of linguistic practice, continuously evolving yet persistently central to how meaning is made and communicated. Understanding these phenomena thus contributes not only to linguistic theory but to broader comprehension of how language mediates human thought, culture, and society.

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# NABI AS A REPRESENTATIVE OF THE DIDACTIC STYLE

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**Abstract**
In Islamic thought, the term "ḥikma" (wisdom) is used in contrast to philosophy and, according to dictionaries, carries meanings such as hidden thought, unknown cause, God's concealed purpose in the creation of beings and events, and proverb, among others. In literature, the term is more commonly employed to denote a worldview grounded in life experience that reflects the general intellectual and moral norms of society. The primary aim of ḥikemī (didactic) poetry, which is based on this mode of thought, is to encourage the reader to reflect, to inform, and to guide individuals toward truth and the right path through reasoned contemplation. In fact, from our earliest written texts beginning with the Gokturk inscriptions through works such as Yusuf Has Hacib's *Kutadgu Bilig*, political treatises (*siyāsatnāmes)*, and the couplets and verses of divans, it is possible to observe didactic motifs centered on moral instruction and guidance. However, as a distinct literary path or movement, didactic-based ḥikemī style or *ḥakīmāne* poetry emerged in the seventeenth century.
**Keywords:** Yusuf Nabi, *ḥakīmāne,* didactic, classical, Turkish.

**Introduction**

One of the prominent representatives of this style and literary school in the seventeenth century was Yusuf Nabi of Urfa. In this regard, the scholar of Classical Turkish literature, Mine Mengi, notes the following: Nabi's position as the founder of a literary school is a manifestation of his character, which is inclined toward reflection and encouraging others to think. Having set as his aim the articulation of ideas related to human beings, life, and society, as well as guiding indecisive individuals toward the right path and offering moral counsel, Nabi sought to convey these ideas through his poetry. [22;131] Even prior to Nabi, the *ḥakīmāne* (didactic–philosophical) poetic style can be observed in the quatrains (*rubai`s*) of Azimzade Haleti (1570–1631). Sources indicate that Haleti was among the intellectuals of his time and that he left behind a rich personal library. In accordance with his temperament, Haleti showed a preference for composing poetry in the *rubai* genre. In his quatrains, the poet articulated the deficiencies of the society in which he lived as well as its moral and social problems, reflecting his ideas and reflections in his poetry. Along the path opened by Nabi through the integration of poetry and thought, poets such as Sabit, Rami Mehmed Pasha, Sami, Seyyid Vehbi, Chelebizade Asim, Kodja Ragib Pasha, Diyarbakirli Hami, Antakyalı Munif, and Reshid were also influenced by this literary movement. According to sources, Rami Mehmed Pasha who was a close friend of Nabi and one of the figures who laid the groundwork for the Treaty of Karlowitz, regarded as a crucial turning point in Turkish history reflected the deterioration of moral norms as well as the political and social conditions of his time in his poetry. Another poet in whose works we observe the century's *ḥikemī* style expressed in a distinctive manner is Alaeddin Sabit from Bosnia (d. 1712). Sabit's incorporation of elements from folk folklore, such as proverbs, idioms, and local expressions, into his poetry represents a significant innovation in Turkish poetry of that period. In addition to these features, his poetry also prominently employs contrasts, puns, simple expressions, and wordplay. According to sources, Kodja Ragib Pasha can be regarded as the most influential representative of this literary school after Nabi [20; 179].

**Main part**

The 17th century was a period of decline for the Ottoman state. Nabi lived during a time when various state institutions were disintegrating. Although this era witnessed political and administrative decline, literary progress and development were notable. During this century, Ottoman poets often compared themselves with Persian poets, emphasizing their own merits. In the second half of the century, the *Sebk-i Hindi* movement exerted an influence over poets such as Nef'i, Naili, and Nabi. During this period, Nef'i transformed the *qasida* by removing it from its traditional panegyric status and introducing a new atmosphere, while Nabi, by emphasizing thought and reflection in his poetry, created the *ḥikemī* style. According to sources, in the *qasida* genre, Nef'i and Nabi are recognized as leading figures; in the *ghazal*, Yahya Efendi; in the *rubai*, Azimzade Haleti; and in the *masnavi* genre, Nevizade Atai Usta.

Nabi, the founder of ḥikemī poetry, was born in Urfa in 1052/1642. Spending his childhood and youth there, he later moved to Istanbul, where he held various official positions. Following the death of his master, Musahip Mustafa Pasha, the poet was sent to Aleppo, where he spent twenty-five years of his life. It was also in Aleppo that he composed his famous works *Xeyriyye* and *Xeyrabat*. Nabi's circumstances changed when Baltacı Mehmed Pasha was appointed Beylerbeyi of Aleppo. In his later years, Nabi returned to Istanbul together with Mehmed Pasha and, according to sources, passed away in 1712. His return to Istanbul was warmly welcomed among poets. In this regard, Bosnian poet Sabit expressed his pleasure at Nabi's return to Istanbul alongside Mehmed Pasha in the *Ramazaniyye* qasida he composed for Baltacı Mehmed Pasha. In the following verses, Sabit praises Nabi as the creator of a new style and as a rare master of his craft:

Yūklēnbūd tazā qumāsh-i-Halebī-ma'nāy,
Gældī Istanbulā shāh-bandarī-tāxt-i-'irfān.

Mūjīdī-wādīy-i-naw muhtārī-tarz-i-jadīd,

Mu-shikāf qalamī nādirah ustād-i-jahān. [31;87]

Providing information about Nabi's family, Prof. Dr. Masarrat Dirioz notes the following: 'His father was Seyid Mustafa; his grandfather, Seyid Mahmud; his great-grandfather, Seyid Mahmud Bakir; and his great-great-grandfather, Sheikh Ahmed Naqshbandi. His brothers were Hacı Mahmud Aga, Hacı Mehmed, and Seyid Ahmed. Hacı Mahmud's sons were Hacı Mehmed and İsmail. One of Nabi's sisters was known as Hacı Hemshire. Nabi's own sons were Abulkheyr Mehmed and Mehmed Amin.

[8;668-673]. Overall, Nabi's works should be examined within the context of the atmosphere of the period in which he lived, having witnessed the reigns of six sultans. Nabi was a figure deeply aware of the unrest and uncertainty of his time, the inefficiencies of state administration, and the social harm caused by widespread corruption among professionals, excessive attachment to wealth and property, hypocrisy, and the pursuit of personal gain in every matter. He sought, at least spiritually under the shadow of reason and wisdom, to live in relative peace [16; 56]. The following couplets, taken from the *cülusiyyah* qasida composed for the accession of Sultan Mahmud IV, provide insight into the state of the country during Nabi's lifetime:

Misāl-i-hāl-yi bī-mah-tab qalmūshdā,
Darūn-i-mulk hazīn tāxt-i-saltanat māghdūr.
Bū dūlatin yūgh īdī bir tabīb-i-qamharī,
Mizāj-i-mamlakat ūmūshdā afiyāt-dūr.
Khārābā tutūsh īdī yūz mazār-i-iqbal,
Riyāz-i-mamlakat qaplāmūsh īdī mār u mūr.
Pūr īdī sabzay-i-bīganā bā gulshan-i-dahr,
Ūtūrush īdī hūmmālār maqām-i-usfur.
Natīja ne qadar jawr-i-tafrīqā bār īshā,
Sipihr jūmlāsīn īkrādā nemūd qūsūr.

The state of the country saddens the observer. The sultanate has fallen prey to injustice. As the nation is in an unhealthy condition, there is no physician capable of restoring it. The fields of fortune and prosperity have been ruined, and the lands of the country have been overrun by ants and serpents. The world, once like a rose garden, has been overtaken by useless plants. The bird of fate, which should be the mythical Huma, has alighted instead as a mere sparrow. As a result, calamity has befallen the Ottoman Empire. [31;87].

Nabi was influenced by Firuddin Attar, who first introduced the *ḥikemī* poetic style and referred to his religious poems as 'wisdom'; by the Azerbaijani poet Saib Tabrizi; and by the Iranian poets Molla Jami and Shovketi-Bukhari. This influence is particularly evident in Nabi's divan composed in Persian. He became the representative in Anatolia of Saib's conception of poetry, adorned with reflection and wisdom. More broadly, didactic and wisdom-oriented ideas and motifs are reflected throughout the literature of the Near and Middle East, and Azerbaijani literature is no exception in this regard.

In the 17th century, Azerbaijani literature featured poems with didactic content and couplets or verses conveying moral and advisory ideas, even if these did not constitute an independent genre. Such themes are evident in the works of Muhammad Emmani, in Masihi's poem *Varqa and Gulshah*, in the poetry of Saib Tabrizi, in the *ghazals, qasidas, rubais*, and single-couplet poems of Qovsi Tabrizi and Maczub Tabrizi, as well as in the lyrical works of poets such as Murtazagulu Khan Zafar and Vahid Qazvini. These works urge readers to live a well-ordered life, to appreciate the valuable blessings granted by God, and to make proper use of their youth. They advise against being driven by worldly wealth and material desires, encourage mutual assistance among people, advocate for wisdom, and warn against spending one's life solely for riches. These poets particularly emphasize doing good deeds, placing trust in the Creator, remaining undaunted by difficulties on the right path, working diligently, and recognizing that everyone will ultimately reap the consequences of their own actions. In his works, Nabi respectfully mentioned Azerbaijani poets such as Nizami, Khaghani, and Saib Tabrizi, and composed *taḫmis* (paraphrastic expansions) on the works of Fuzuli and Saib Tabrizi. The great Azerbaijani poet Fuzuli had a significant influence on Nabi, particularly evident in Nabi's *Qasideyi-'Ezliyye*, where the impact of Fuzuli's *Shikayātnāme* is clearly visible. [18].

Nabi produced numerous works in both prose and poetry. His divans in Turkish and Persian, the *masnavi Xeyriyye*, *Xeyrabad*, *Tercumeyi-Hadisi-Arbain*, and *Surname* were composed in verse, while works such as *Fetihnameyi-Kamaniche*, *Zeyli-siyeri-Veysi*, *Tohfetul-harameyn*, and *Munshaat* were written in prose. Among these, however, the two works in Turkish - the *Divan* and *Xeyriyye* - brought the poet the greatest fame. Nabi's poetic conception can be understood from certain couplets taken from his work *Xeyriyye*:

Ḥikmat-āmīz garkdūr ash-shar
Ki ma'ālī būlā irshādā medār.
Āb-i-ḥikmat-lā bulūr nawsh u namā,
Gulshan-i-shi'r u riyāz-i-inshā.

Poetry must be imbued with wisdom, for the purpose of poetry is to awaken the reader and guide them to the right path. When the rose garden of poetry and the field of prose are watered with the water of wisdom, what grows there will be nourished more fully [31; 86]. Nabi explained his interest in writing poetry as follows:

Tavajjuh nemēz idim shī'r-i Nābī-yā bī-hamd,
Bayān-i-sirr-i-ḥikām olmasāydī maẓmūnū.

If the content of poetry did not contain the secrets of wisdom, I would not be so interested in it. In his work *Xeyriyye*, Nabi also criticizes the poetic approach of his contemporaries, reproaching them for writing poems focused solely on love and failing to bring any innovation to poetry.

Baxsān aksar suhān-i-shā'ir-i-khām,
Zulfu sunbul gülü bülbül mey-u jām.

Chıxamaz dā'ireyi-dilbar-dan,
Qadd-u hadd-u lab-u chashmi-tar-dan.

Gāh bahāra tolāshur gāh chamanā,
Ilīshur sarv u gülü yāsamanā.
.....
Kechinur mānīy-i hayidā bīlā,
Lafzi-mashhūr u jahān-dīdā bīlā.

Ikī har-vārdur ū beyti-du-tā,
Kolmāya tazā qumāsh-i-ma'nā.

Examining the poems of inexperienced poets, we observe that they focus on hair, ears of grain, roses, nightingales, wine, and cups. They speak of the beloved's neck, mole, lips, or eyes. Their poems mention spring, cypress, and jasmine. By merely repeating what has already been said, they attempt to navigate poetic expression. Their couplets, like two burdened donkeys, carry old meanings instead of weaving new ones. Nabi placed great emphasis on poetry as a means of effectively conveying ideas to people. This is evident from certain couplets in his work *Xeyriyye*:

Tiz farāmūsh olunur nasr suhān,
Nazm ammā ki edar dowri-dehān.

While what is conveyed in prose is quickly forgotten, poetry circulates orally and remains in memory for a long time. However, not every work written in verse, which we call poetry, is easily retained in memory. The most essential condition for this is that the poetry must be harmonious:

Suhān ūl dānlu khūsh-āyandā garkdūr ki ānī,
Edanā naw-i-bashar bālkī malā'īk azbar.

Poetry must be melodious to the ear in order to be memorized, not only humans, but also angels, can commit to memory poetry that is pleasing in sound. [31;89].

Within his Turkish divan, Nabi included ghazals and *taḫmis* in Persian. His work *Tercumei-Hadisi-Arbain* is a Turkish metrical translation of Molla Jami's *Translation of Forty Hadiths*. Influenced by Firuddin Attar's *Ilāhīnāme*, his *Xeyrabat* is a *masnavi* composed in a lyrical, romantic style. The *Surname*, which recounts the circumcision ceremonies of Sultan Mahmud IV's sons, is particularly valuable for reflecting the social, political, and historical conditions of its time. As in his poetic works, Nabi also demonstrated remarkable literary prowess in his prose compositions. For instance, in his *Fetihnameyi-Kamaniche*, the poet conveyed his impressions of Sultan Mahmud IV's campaign to the Kingdom of Poland (Lehistan) and the capture of the Kamianets fortress. This work was published in Istanbul in 1865. The work *Tohfatul-Harameyn* recounts Nabi's impressions during his pilgrimage (Hajj). *Zeyli-siyeri Veysi* consists of Nabi's additions to the prose work of the 7th-century author Veysi, which covers events from the birth of Prophet Muhammad to the Battle of Badr. Nabi's *Münshaat* comprises his official and personal correspondence. As noted above, Nabi's *Divan* remains the work that brought him his greatest renown. Manuscripts of Urfa-born Yusuf Nabi's works are preserved in hundreds in libraries around the world, particularly in Switzerland, the United Kingdom, Russia, and especially in Turkey. The *Catalogue of Manuscript Divans of Istanbul Libraries* provides information on the Turkish copies of Nabi's works. Of the 35 Istanbul manuscripts, two were copied during the author's lifetime; 11 are dated and 24 are undated. The dated manuscripts:

1)H.1108 (1696/97) – Istanbul University Library, T.5575/5/1 2)H.1112 (1700) – Istanbul University Library, 3)H.1125 (1713) – Topkapi Palace Museum (Treasury Library) – 857, 4) H.1136 (1724) – Topkapi Palace Museum (Emanet Library) – 1634 5) H.1138 (1725) – Köprülü Library (Asim Bey) – 426 6)H.1139 (1726) – Süleymaniye Library (Hamdiyya) – 1117 7)H.1148 (1736) – Topkapi Palace Museum (Treasury) – 954 8)H.1153 (1740) – Ragib Pasha Library – 1113 9)H.1170 (1756) – Süleymaniye Library (Halet Efendi) – 683 10)H.1170 (1757) – Süleymaniye Library (Yahya Tevfik Efendi) – 306 11)H.1187 (1773) – Süleymaniye Library (Hafiz Efendi) – 940

At the Institute of Manuscripts named after Muhammad Fuzuli of the Azerbaijan National Academy of Sciences five copies of three of this renowned poet's works have been identified across four manuscript volumes.

In the manuscript of the *Divan* with the code B-5215, 499 ghazals, 29 rubais, qitas, and *taḫmis* on Bakhai's poems by Nabi are included. The manuscript consists of 122 folios and measures 15×20.5, with the text area being 9×16. Each page contains 17 lines of verse. It is unbound. The text is written in *nastaliq s*cript with black ink on European paper. The paper bears a watermark dating from the 8th century (Hijri). The scribe was Muhammad Sadiq al-Vani, and the copy was completed in 1164/1750. On folio 1b, there is a note indicating that this manuscript belonged to Mehdi, the son of Haji Hasan Kamarli, a teacher of the Iravan school. The manuscript begins as follows:

الغاظیدن معانی یه خاندر بو
Al-Qāzīdan ma'ānīyē khāndir,
الد مع من العین الی الحال دلسل
It ends with a couplet.

The work *Xeyriyye*, written in Aleppo by Nabi for his son Abulkheyr Mehmed, is a didactic piece that addresses how his son should live as a virtuous and happy member of society. Through his son, Nabi also offers guidance to the youth of his time, aiming to show them the right path. The work is particularly valuable for its portrayal of the historical and social conditions of the period, often with elements of satire. *Xeyriyye* is composed in the meter *fāʿilātun fāʿilātun fāʿilātun fāʿilun*.

Copies of the work *Kitabı-Xeyriyye* are held at the Institute of Manuscripts of the Azerbaijan National Academy of Sciences (ANAS). The manuscript with the code B-5215 consists of 54 folios, measuring 15×20.5, with a text area of 9×16. The manuscript is unbound, and each page contains 17 lines of verse. The work was first printed in 1252/1841 under the title *Kulliyatı-Nabi* at the Bulaq Press and was printed a second time in 1307/1889 at the lithography of Abu Ziya. The text is written in *nastaliq* script with black ink on European paper, which bears an 8th century watermark. On folio 178ab, there is a *taḫmis* composed by Nabi for the poet Sidqi, in which he employed eight couplets from Nasimi. The scribe was Muhammad Sadiq al-Vani, and the manuscript was copied in 1196/1781.

The manuscript begins as follows:
حمد اول الله عظیم الشانه
Hamd ol Allāhı-'Azīm-i-'Alīshānā
بر فاتحه در رجای نابی
It is a Fātiḥah, composed by Rijā'ī-Nabi.
It ends with a couplet.

A manuscript of the religious and moral *masnavi* that Nabi wrote over fifty years for his son Abdu'l al-Khayr Muhammad Chelebi is preserved at the Institute of Manuscripts under the code B-4321. This manuscript is registered under the title *Nasihatname*. Consisting of 51 folios, it measures 16×22, with 15–16 lines per page.

Bound in a green cardboard cover, the work is contained between folios 45a–96b. The text is written in *nastaliq* script with black ink on white paper, arranged in two columns. There are 25 headings, distinguished in red ink. The manuscript was copied in 1260/1844.

The scribe is احمد بن محمود افندی نعمت ابادیAhmed bin Mahmud Efendi Nematabadi.

The work begins as follows:

حمد اول الله عظیم الشانه

Hamd ol Allāhı-ʻAzīm-i-ʻAlīshānā

It ends.

خیر ایده حضرت حق انجامك

Xeyr edə Hazrat-i Haqq anjāmın

Two copies of the prose work *Tohfatul-Harameyn* by the poet are preserved at the Institute of Manuscripts named after Muhammad Fuzuli of the Azerbaijan National Academy of Sciences (ANAS). One of these is the manuscript coded B-7406. The 70-folio manuscript is bound in brown leather and measures 11.5×20.5. Each page contains 20 lines of text, which is written in *nastaliq* script.

The work begins as follows:

ای بیت حرامی صف غفرانه مقام

Ey beyti-harāmi, safi-qafrāna maqām (1b)

بو تحفه حرمینم قبول ایده مولی تمت الکتاب

It ends. ... Bu *Töhfeyi-Hərameyn*in qəbûl eylə Mövlā. Tammat al-kitāb (68a-b)

The second manuscript is coded B-321. It measures 14×20 cm and consists of 57 folios, bound in a red leather cover. The manuscript bears a seal dated 1158 belonging to a person named Ismail. It is contained in the same volume as Abu-Nasr Farahi's *Nisab-us-Sibyan*. The text was copied in *nastaliq* script in 1128/1715.

The work begins as follows:

ای بیت حرامی صف غفرانه مقام

It ends.

بو تحفه حرمینم قبول ایده مولی تمت الکتاب

فی سنه ۱۱۲۸

**Conclusion**

Nabi's oeuvre occupies a significant place in the literary history of Azerbaijan and the Ottoman Empire. His works, composed in both verse and prose, present a rich content that aims to stimulate thought and guide readers toward the right path through didactic and wisdom-oriented motifs. The manuscript copies preserved at the Institute of Manuscripts named after Muhammad Fuzuli of the Azerbaijan National Academy of Sciences (ANAS), particularly those in Baku, provide valuable primary sources for studying Nabi's creativity. In works such as the *Divan*, *Xeyriyye*, *Tohfatul-Harameyn*, and others, guidance, wisdom, and moral precepts are emphasized, reflecting the socio-political conditions of his time while also influencing the development of Azerbaijani literature. Nabi considered showing the right path to both the youth of his era and humanity in general as a central aim, and through his stylistic innovations in poetry and prose, he established a literary school. The wisdom-laden and didactic content of his works remains a valuable literary heritage for contemporary readers and scholars alike.

Nabi's oeuvre is remarkably rich and engaging. In particular, the copies of his works preserved at the Institute of Manuscripts named after Muhammad Fuzuli of the Azerbaijan National Academy of Sciences (ANAS) make the study of this esteemed poet's creativity, based on the manuscripts held in Baku, highly significant and timely.

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# SOCIAL SCIENCES

## ТЕОРЕТИЧЕСКИЕ ПОДХОДЫ К ИЗУЧЕНИЮ СОЦИАЛЬНОЙ ИДЕНТИЧНОСТИ В ЦИФРОВЫХ СООБЩЕСТВАХ

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## THEORETICAL APPROACHES TO THE STUDY OF SOCIAL IDENTITY IN DIGITAL COMMUNITIES

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**Аннотация**

Статья направлена на систематизацию и сопоставление теоретических подходов к изучению социальной идентичности в условиях цифровизации и формирования киберпространства. В работе анализируются классические концепции социальной идентичности и их расширение в рамках современных теорий сетевого и платформенного общества. Особое внимание уделяется цифровым сообществам как специфической форме социальной организации и ИТ-сообществам как профессионально ориентированному и методологически показательному случаю. Обосновывается положение о том, что социальная идентичность в цифровой среде формируется как многоуровневый и процессуальный феномен, зависящий от сетевых взаимодействий, коллективных практик и инфраструктурных условий цифровых платформ. Полученные выводы формируют концептуальные предпосылки для дальнейших эмпирических исследований трансформации социальной идентичности в ИТ-сообществах.

**Abstract**

This article aims to systematise and compare theoretical approaches to the study of social identity in the context of digitalisation and the formation of cyberspace. The paper analyses classical concepts of social identity and their subsequent development within contemporary theories of the network society and the platform society. Attention is paid to digital communities as a specific form of social organisation and to IT communities as a professionally oriented and methodologically illustrative case. The article substantiates the argument that social identity in the digital environment is formed as a multi-level and processual phenomenon shaped by network interactions, collective practices, and the infrastructural conditions of digital platforms. The findings provide a conceptual foundation for further empirical research into the transformation of social identity within IT communities.

**Ключевые слова:** социальная идентичность, киберпространство, цифровые сообщества, ИТ-сообщества, сообщества практики, сетевое общество, цифровые платформы.

**Keywords:** social identity, cyberspace, digital communities, IT communities, communities of practice, network society, digital platforms.

Введение

Цифровизация социальных взаимодействий и распространение сетевых форм коммуникации привели к существенной трансформации механизмов формирования и воспроизводства социальной идентичности. Киберпространство перестало быть вспомогательной средой социального взаимодействия и выступает как самостоятельное социальное пространство, в рамках которого возникают устойчивые сообщества, нормы, формы принадлежности и символические иерархии. В этом контексте особый исследовательский интерес представляют цифровые сообщества, формирующиеся вокруг профессиональной деятельности, прежде всего ИТ-сообщества, характеризующиеся высокой степенью самоорганизации и глобальной связности.

Несмотря на значительный массив исследований, посвящённых социальной идентичности, большинство классических теоретических подходов формировались вне цифрового контекста и лишь частично учитывают специфику сетевых форм социальности. Современные цифровые сообщества ставят под вопрос традиционные представления о границах групповой принадлежности, устойчивости идентичности и соотношении индивидуального и коллективного измерений социальной идентификации.

Цель данной статьи заключается в систематизации и критическом анализе теоретических подходов к изучению социальной идентичности в условиях киберпространства с акцентом на цифровые сообщества и ИТ-сообщества как их специфический тип. Задачами исследования являются выявление эвристического потенциала классических и современных теорий социальной идентичности, а также определение теоретических оснований для дальнейшего эмпирического анализа процессов идентификации в цифровых профессиональных сообществах.

**1. Теоретические основы социальной идентичности**

Социальная идентичность в классической социальной теории рассматривается как ключевой механизм соотнесения индивида с социальными группами, категориями и системами принадлежности. Теоретические основания данного понятия формировались преимущественно в рамках социальной психологии и социологии и были ориентированы на анализ офлайн-социальности, институциональных форм групповой жизни и устойчивых структур социального взаимодействия.

Базовым теоретическим подходом к анализу социальной идентичности является теория социальной идентичности, разработанная Анри Тэджфелом и Джоном Тернером. В рамках данной теории социальная идентичность определяется как часть самоконцепции индивида, производная от его осознания принадлежности к социальной группе и эмоционально-оценочного отношения к этой принадлежности [1]. Ключевым механизмом формирования социальной идентичности выступает социальная категоризация, позволяющая упорядочивать социальное пространство через разделение на группы и подгруппы. Важным элементом данного подхода является идея межгруппового сравнения, в рамках которого формируются символические границы между «своими» и «чужими», а также иерархии социальной значимости.

Развитие теории самокатегоризации, связанной с работами Джона Тёрнера, позволило уточнить когнитивные механизмы идентификации и показать, что социальная идентичность носит контекстуальный характер и активируется в зависимости от социальной ситуации. Тем самым была заложена основа для понимания идентичности как динамического, а не фиксированного феномена, что впоследствии стало методологически значимым для анализа сетевых и цифровых форм социальности. Социологическое осмысление социальной идентичности связано с акцентом на процессы социального взаимодействия и совместной деятельности. Существенный вклад в данное направление внесла теория сообществ практики Этьена Венгера, в рамках которой идентичность рассматривается как результат участия индивида в коллективной практике и освоения определённых форм знания и компетентности [2]. В отличие от социально-психологического подхода, здесь идентичность понимается не только как когнитивная принадлежность к группе, но и как процесс социального становления, опосредованный участием, признанием и накоплением профессионального опыта. Идентичность формируется через включённость в практику и подтверждается сообществом, что делает данный подход особенно релевантным для анализа профессиональных сообществ.

Важным этапом в развитии теоретических оснований социальной идентичности стало переосмысление её устойчивости и целостности в условиях поздней модерности. В концепции сетевого общества Мануэля Кастельса идентичность рассматривается как множественная и фрагментированная, формирующаяся в условиях децентрализованных сетей коммуникации и информационных потоков [3]. Хотя Кастельс не разрабатывает теорию идентичности в узком смысле, его подход позволяет рассматривать идентификацию как процесс, всё в большей степени выходящий за рамки традиционных институтов и территориально ограниченных сообществ.

Современные исследования социальной идентичности также учитывают влияние цифровых инфраструктур и платформенных экосистем на процессы социальной принадлежности. В работах, посвящённых платформенному обществу, подчёркивается, что социальные связи и формы идентификации всё чаще опосредуются цифровыми платформами, логикой алгоритмической видимости и метриками социального признания [4]. В этих условиях идентичность не столько формируется заново, сколько опосредуется и структурируется новыми технологическими и институциональными механизмами. Дополнительное измерение теоретического анализа социальной идентичности связано с критикой ускорения социальных процессов в условиях цифрового капитализма. Исследования, посвящённые временным аспектам цифровизации, указывают на рост изменчивости социальных ролей и идентификаций, а также на усиление рефлексивной нагрузки на индивида [5], что приводит к ослаблению долгосрочных форм принадлежности и усилению ситуативных и контекстуальных идентификаций.

В целом теоретические основания социальной идентичности представляют собой совокупность взаимодополняющих подходов, акцентирующих когнитивные, коммуникативные и практико-ориентированные аспекты идентификации. Классические теории заложили аналитический каркас для понимания социальной принадлежности, однако в условиях цифровизации они требуют концептуального расширения. Данные основания создают методологическую базу для дальнейшего анализа социальной идентичности в киберпространстве и в рамках цифровых профессиональных сообществ.

**2. Социальная идентичность в киберпространстве**

Формирование киберпространства как устойчивого измерения социальной реальности привело к существенным изменениям условий социальной идентификации. В рамках цифровых коммуникаций социальная идентичность конструируется и воспроизводится в среде, характеризующейся децентрализованностью, опосредованностью взаимодействий и высокой степенью символической прозрачности. Киберпространство в данном контексте рассматривается не как «виртуальная» альтернатива социальной реальности, а как социально организованная коммуникативная среда, обладающая собственными нормами, режимами включённости и механизмами признания.

Теоретическое осмысление идентичности в киберпространстве опирается на концепцию сетевого общества, в рамках которой социальные связи формируются преимущественно на основе сетевой логики, а не территориальной или институциональной принадлежности [3]. В условиях сетевой организации социальная идентичность утрачивает

жёсткую привязку к стабильным социальным ролям и приобретает множественный и контекстуально зависимый характер. Идентификационные позиции активируются в зависимости от конфигурации сетевых взаимодействий, интенсивности коммуникации и степени включённости в информационные потоки. Существенной особенностью социальной идентичности в киберпространстве является её опосредование цифровыми интерфейсами и технологическими инфраструктурами. Социальное присутствие индивида в сети осуществляется через профили, аккаунты и иные формы цифровой репрезентации, которые выполняют функцию публичных маркеров идентичности. Такого рода репрезентации становятся объектом постоянной интерпретации и оценки со стороны других участников сетевого взаимодействия, что усиливает рефлексивный характер идентичности и делает её зависимой от коммуникативной видимости и социальной обратной связи [6].

Дополнительное измерение анализа социальной идентичности в киберпространстве связано с влиянием платформенных экосистем. В условиях платформенного общества формы социальной принадлежности и признания структурируются логикой цифровых платформ, алгоритмическими механизмами ранжирования и метриками активности [4], тем самым идентичность формируется и воспроизводится не только через межличностное взаимодействие, но и через инфраструктурные условия, задаваемые технологическими посредниками. Такие условия влияют на доступность идентификационных ресурсов, устойчивость статуса и возможности символического признания.

Характерной чертой киберпространства является также размывание границ между различными социальными контекстами. Профессиональные, личные и публичные аспекты идентичности в цифровой среде нередко пересекаются, формируя гибридные идентификационные конфигурации. Индивид может одновременно выступать как профессиональный эксперт, участник онлайн-сообщества и активный пользователь цифровых платформ, что усложняет процессы самоопределения и социальной принадлежности. Данная множественность идентичностей не является исключительно цифровым феноменом, однако в киберпространстве она приобретает более выраженный и институционально закреплённый характер [3]. Отдельного внимания заслуживает временное измерение социальной идентичности в киберпространстве. Ускорение цифровых коммуникаций и постоянная доступность сетевых взаимодействий приводят к изменению режимов воспроизводства идентичности. Социальная идентичность всё в большей степени требует регулярного подтверждения через активность, присутствие и обновление цифровых репрезентаций, что снижает устойчивость долгосрочных форм принадлежности и усиливает зависимость идентификационных позиций от текущего контекста [5].

В совокупности данные подходы позволяют рассматривать социальную идентичность в киберпространстве как многоуровневый и процессуальный феномен, формирующийся на пересечении индивидуальной рефлексии, сетевых взаимодействий и инфраструктурных условий цифровой среды. Киберпространство не отменяет классические механизмы социальной идентификации, однако существенно трансформирует формы их реализации, что создаёт теоретические предпосылки для анализа цифровых сообществ как специфических пространств социальной организации.

**3. Цифровые сообщества как форма социальной организации**

Цифровые сообщества в современном обществе выступают как особая форма социальной организации, формирующаяся и функционирующая в условиях киберпространства. В отличие от спонтанных или эпизодических сетевых взаимодействий, цифровые сообщества характеризуются относительной устойчивостью, воспроизводством норм и наличием механизмов социальной регуляции. Тем самым они не сводятся к совокупности пользователей или коммуникационных актов, а представляют собой организованные формы коллективности, обладающие собственной социальной логикой.

В теоретической перспективе цифровые сообщества соотносятся с логикой сетевого общества, в рамках которой социальная организация выстраивается на основе горизонтальных коммуникаций и распределённых сетей взаимодействия [3]. При этом принадлежность к сообществу определяется не формальным членством, а регулярным участием в коммуникации, признанием со стороны других участников и включённостью в совместные практики. Социальная организация цифровых сообществ опирается на устойчивые коммуникативные паттерны и разделяемые смысловые ориентиры, которые воспроизводятся в процессе взаимодействия. Концепция сообществ практики позволяет более точно описать механизмы формирования и поддержания цифровых сообществ. В этой логике сообщество возникает вокруг совместной деятельности, обмена знаниями и воспроизводства определённых практик [2]. В цифровой среде данные механизмы сохраняются, однако реализуются в опосредованной и распределённой форме. Участие может быть асинхронным, а признание компетентности осуществляется через публично доступные индикаторы активности, вклада и экспертности. Социальная идентичность участника формируется через включённость в практику и подтверждается коллективным признанием, а не формальными статусами.

Социальная регуляция в цифровых сообществах носит преимущественно не институциональный характер. Нормы поведения, ожидания и формы санкций формируются внутри сообщества и поддерживаются через коммуникацию, репутационные оценки и механизмы символического признания. В отличие от офлайн-сообществ, данные механизмы зачастую не кодифицированы и функционируют в имплицитной форме, что усиливает роль коллективных интерпретаций и ситуативных договорённостей, что делает цифровые сообщества

гибкими, но одновременно повышает их уязвимость к внутренним конфликтам и фрагментации.

Существенное влияние на формы социальной организации цифровых сообществ оказывают платформенные условия их функционирования. Архитектура цифровых платформ задаёт рамки взаимодействия, структурирует потоки коммуникации и определяет режимы видимости участников [4]. Алгоритмические механизмы ранжирования и отбора контента влияют на распределение внимания, доступ к символическому признанию и воспроизводство иерархий внутри сообщества. В результате социальная организация цифровых сообществ формируется на пересечении коллективных практик и инфраструктурных ограничений, не всегда полностью контролируемых самими участниками. Характерной особенностью цифровых сообществ является сочетание формальной открытости и фактической селективности. Несмотря на относительную доступность входа, устойчивое участие и признание требуют соответствия негласным нормам, демонстрации компетентности и способности интегрироваться в существующую коммуникационную культуру. Таким образом, цифровые сообщества воспроизводят собственные механизмы включения и исключения, которые непосредственно связаны с процессами социальной идентификации и поддержания групповых границ.

В целом цифровые сообщества могут рассматриваться как гибридная форма социальной организации, сочетающая элементы сетевых структур, сообществ практики и платформенно опосредованных взаимодействий. Они создают специфические условия для формирования социальной идентичности, в которых принадлежность, признание и участие приобретают процессуальный и контекстуально зависимый характер. Все вышеуказанное позволяет рассматривать цифровые сообщества как ключевое аналитическое звено между киберпространством и конкретными профессиональными сообществами, включая ИТ-сообщества, что требует дальнейшего рассмотрения.

**4. ИТ-сообщества и трансформация социальной идентичности**

ИТ-сообщества представляют собой специфический тип цифровых сообществ, в рамках которых процессы социальной идентификации напрямую связаны с профессиональной деятельностью, экспертизой и участием в распределённых практиках создания и сопровождения цифровых технологий. В отличие от многих иных форм онлайн-коллективности, ИТ-сообщества формируются вокруг устойчивых профессиональных задач, общих стандартов качества и разделяемых норм профессионального поведения, что придаёт им сравнительно высокую степень структурной устойчивости.

С теоретической точки зрения ИТ-сообщества могут быть рассмотрены как особый случай сообществ практики, где идентичность формируется через участие в совместной деятельности, освоение специализированных знаний и признание компетентности со стороны профессионального окружения [2]. Принадлежность к ИТ-сообществу определяется не формальным статусом, организационной иерархией или территориальной локализацией, а способностью вносить значимый вклад в коллективную практику. В этом контексте социальная идентичность приобретает выраженное профессиональное измерение и формируется как результат практического участия и коллективного признания. Функционирование ИТ-сообществ в условиях киберпространства подчиняется сетевой логике, характерной для современного сетевого общества [3]. Коммуникации между участниками носят преимущественно горизонтальный характер, а координация деятельности осуществляется через распределённые цифровые каналы. Формальная иерархия в таких сообществах ослаблена, однако на её месте возникают репутационные и экспертные иерархии, основанные на признании профессионального вклада. Тем самым ИТ-сообщества тяготеют к меритократической логике социальной организации, в рамках которой статус и идентичность участника зависят от демонстрируемой компетентности и практических результатов.

Характерной чертой ИТ-сообществ является гибридность социальной идентичности. Участники одновременно выступают как профессионалы, члены цифрового сообщества и пользователи платформ, в рамках которых разворачивается взаимодействие, что приводит к наложению различных идентификационных контекстов и формированию сложных конфигураций принадлежности. В отличие от многих непрофессиональных цифровых сообществ, в ИТ-среде профессиональная идентичность выступает доминирующим элементом, вокруг которого структурируются и социальные, и коммуникативные аспекты идентификации.

Существенное влияние на трансформацию социальной идентичности в ИТ-сообществах оказывают платформенные условия их функционирования. Цифровые платформы задают архитектуру взаимодействий, определяют формы представления профессионального опыта и структурируют механизмы признания [4]. Алгоритмические системы ранжирования, метрики активности и публичные профили формируют дополнительные основания для социальной стратификации, нередко усиливая конкуренцию между участниками. В результате социальная идентичность формируется на пересечении индивидуальных компетенций, коллективных практик и инфраструктурных ограничений цифровой среды, что создаёт внутреннее напряжение между декларируемой горизонтальностью и фактической иерархичностью. Дополнительным фактором трансформации социальной идентичности в ИТ-сообществах является временная динамика цифрового труда. Высокая скорость технологических изменений и ускорение коммуникаций требуют постоянного обновления знаний и навыков, что снижает устойчивость профессиональной идентичности и усиливает её процессуальный характер [5]. Принадлежность к ИТ-сообществу предполагает непрерывное подтверждение актуальности компетенций и профессионального вклада, вследствие чего идентичность всё в большей степени зависит от текущей активности и видимости в цифровой среде.

В целом ИТ-сообщества выступают как пространство трансформации социальной идентичности, в котором классические механизмы профессиональной принадлежности сочетаются с сетевыми и платформенно обусловленными формами социальной организации. Социальная идентичность в этих сообществах формируется как динамический и многоуровневый процесс, опирающийся на участие в практике, коллективное признание и инфраструктурные условия цифровой среды. Проведенный анализ ИТ-сообществ позволяет выявить ключевые направления изменения социальной идентичности в условиях киберпространства и служит теоретической основой для последующего эмпирического исследования.

**Заключение**

Проведённый теоретический анализ показал, что классические подходы к изучению социальной идентичности, сформировавшиеся вне цифрового контекста, сохраняют эвристическую ценность, однако оказываются недостаточными для объяснения современных форм идентификации в условиях киберпространства. Такие теоретические модели адекватно описывают механизмы групповой принадлежности и категоризации, но слабо учитывают сетевую логику взаимодействий, платформенную опосредованность и ускоренную динамику воспроизводства идентичности.

Рассмотрение киберпространства как социально организованной коммуникативной среды позволило уточнить условия формирования социальной идентичности в цифровом контексте. Социальная идентичность в киберпространстве носит процессуальный и контекстуально зависимый характер и всё в большей степени формируется на основе видимости, активности и включённости в сетевые коммуникации. Данные характеристики создают предпосылки для возникновения устойчивых цифровых сообществ, которые не сводятся к совокупности коммуникационных актов, а выступают как особые формы социальной организации.

Анализ цифровых сообществ показал, что они представляют собой гибридные формы коллективности, сочетающие элементы сетевых структур, сообществ практики и платформенно обусловленных взаимодействий. В таких сообществах социальная идентичность формируется на мезоуровне социальной организации через участие в совместных практиках, коллективное признание и воспроизводство норм. Одновременно на макроуровне на эти процессы воздействуют инфраструктурные и институциональные условия цифровой среды, формируя новые основания социальной дифференциации и неявных иерархий. Рассмотрение ИТ-сообществ позволило выявить наиболее выраженные формы трансформации социальной идентичности в цифровых профессиональных средах. В ИТ-сообществах профессиональная идентичность формируется преимущественно в логике сообществ практики и тяготеет к меритократическим основаниям признания, где статус участника определяется вкладом, экспертизой и актуальностью компетенций. В то же время данная логика сосуществует с платформенно и временно обусловленными ограничениями, что порождает внутренние противоречия между декларируемой горизонтальностью взаимодействий и фактической дифференциацией возможностей и статусов.

В целом результаты обзорного анализа подтверждают необходимость многоуровневого подхода к исследованию социальной идентичности в цифровых сообществах, включающего микроуровень индивидуальной рефлексии и самокатегоризации, мезоуровень коллективных практик и норм, а также макроуровень инфраструктурных и платформенных условий. Представленные теоретические выводы обосновывают выбор ИТ-сообществ в качестве аналитического объекта и формируют концептуальную основу для последующего эмпирического исследования процессов трансформации социальной идентичности в условиях киберпространства.

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# TECHNICAL SCIENCES

## AUTOMATION OF DATA ENTRY IN B2B DOCUMENT FLOW BASED ON A DIGITAL TWIN OF AN ORDER

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**Abstract**

The article describes research into the automation of electronic document management processes in B2B e-commerce systems. It has been determined that the critical stage in ensuring the accuracy of primary documentation in such systems is the process of forming order specifications. A scientific and practical approach to automating data entry using the concept of a "digital twin" for the order basket is proposed. A mathematical model of the time required to process an order and software modules for the Magento 2 platform (BarcodeScanner and MultiSwatches) have been developed, which implement machine vision and matrix data entry methods. Experiments have confirmed a 3-4-fold reduction in the time required to generate documents and a minimization of human error.

**Keywords:** electronic document management, B2B, digital twins, automation, barcoding, attribute matrix, blockchain.

**Introduction.** The rapid development of e-commerce and the transition of business processes to the digital space require new approaches to the organization of electronic document management (EDM). In the B2B (Business-to-Business) segment, the specifics of orders differ significantly from retail trade: a large number of items (SKUs), regularity of purchases, and strict requirements for the accuracy of accompanying documentation (invoices, delivery notes).

The main problem with modern B2B platforms is the gap between the customer's physical need (for example, the need to replenish the warehouse with specific goods) and the process of creating a digital document. Manually entering data on hundreds of goods into the system inevitably leads to errors, which in turn causes inaccuracies in legally significant documents, delays in logistics, and financial losses.

**Analysis of recent studies and publications.** The issue of building complex mathematical models of electronic documentation has been thoroughly researched in the works of scientists at Zhytomyr Polytechnic, in particular in [1,2]. The authors emphasize the complexity of algorithmizing the processing of unstructured data in document management systems [2]. However, despite a solid theoretical basis, the practical aspects of automated filling of primary documents (Data Entry) directly at the moment of a business transaction require further study. Most studies focus on the stages of signing (EDS), encryption, and document transfer. However, the stage of generating input data (Data Entry) for these documents is often overlooked.

Modern platforms such as Magento 2, Shopify, and SAP Commerce offer basic shopping cart functionality focused on visual selection (B2C scenario). At the same time, the concept of Digital Twins, which is actively used in Industry 4.0, opens up new opportunities for e-commerce [3,4]. Issues of modern information system architecture are discussed in the works of scientists from Zhytomyr Polytechnic, in particular M.S.Graf and V.A.Raikovsky [5,6]. Interpreting the order basket as a digital twin of the physical delivery allows the use of automatic object identification (Auto-ID) methods for instant synchronization of the "customer's warehouse" and "supplier's document" statuses.

**The purpose of this study is** to improve the efficiency of electronic document management in B2B systems by developing methods and software tools for automated order specification generation on the Magento 2 platform, based on barcode scanning and matrix attribute selection technologies.

**Presentation of the main material.**

**Mathematical model of document formation**

The process of creating an electronic document (order) can be represented as the formation of a set of tuples:

$$D = \{(id_i, q_i, p_i) | \ i = 1, \ldots, N\}, \quad (1)$$

where $id_i$ - product identifier, $q_i$ - quantity, $p_i$ - price, $N$ - total number of items.

Total time $T$, necessary for creating a correct document, consists of the time spent searching for goods ($t_{search}$), time of parameter selection ($t_{select}$), time of entry quantity ($t_{qty}$) and validation time ($t_{valid}$):

**For manual mode:**

$$T_{manual} = \sum_{i=1}^{N} (t_{search}(id_i) + t_{select}(id_i) + t_{qty}(id_i) + t_{valid}(id_i)), \quad (2)$$

Since $t_{search}$ depends on the complexity of the catalog and $t_{valid}$ is often performed post facto (after an error), this function has a nonlinear dependence on operator fatigue.

It is important to note that the generated electronic document must meet the requirements of integrity and authenticity in accordance with the Law of Ukraine "On Electronic Trust Services" [7]. As noted by Yu. A. Tarnavsky [8], the automation of input data is a prerequisite for the transition to legally significant document flow, as it eliminates the risk of information distortion at the stage of its digitization.

**For automatic mode using a scanner:**

$$T_{auto} = \sum_{i=1}^{N} (t_{scan}(id_i) + t_{sys_response}) + T_{overhead}, \quad (3)$$

where $t_{scan}$ - camera focus time (constant), ≈ 1-2 s), $t_{sys_response}$ - server response time (AJAX request), $T_{overhead}$ - module initialization time. $t_{sys_response}$ (server response) can be either for each item separately (if scanning one by one) or one for the entire package (if sending as an array).

Since batch transmission is considered, formula (3) can be written as:

$$T_{auto} = \sum t_{scan} + T_{request}. \quad (4)$$

The implementation of automation modules allows you to achieve the following conditions $T_{auto}$ □ $T_{manual}$ при $N > 10$, and also reduce the probability of error thanks to hardware validation of the barcode checksum.

**System architecture and concept of the Digital Twin**

In the developed system, the digital twin of the order is formed not through manual selection, but through a sensor network (cameras of customers mobile devices).

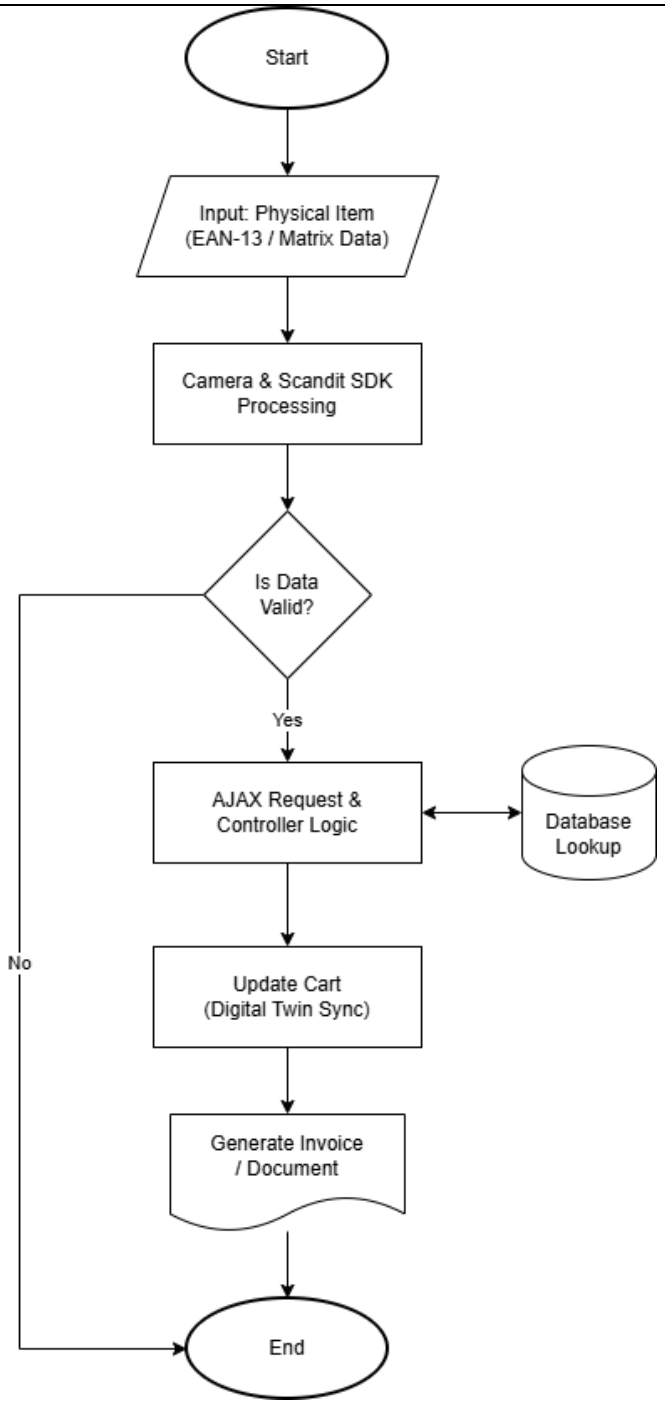


*Figure 1: Block diagram consisting of three levels*

Physical level: User with a smartphone, Product with a barcode (EAN-13). Sensor level (Client side): Scandit SDK (image recognition), JS controller (event processing). Digital level (Magento server side): Database (EAV attributes), BarcodeScanner module, MultiSwatches module, PDF document generator. The arrows show the data flow from the barcode to the finished invoice.

Figure 1 shows a block diagram of the algorithm for automated input data generation for electronic document management. The information processing process is divided into four logical stages that reflect the transformation of a physical object into a digital document:

Initialization and physical input stage. The process begins (Start block) with the operator initiating data entry. The input parameters are a physical product identified by an EAN-13 barcode or a set of product configurations selected via a matrix interface (Input block).

Client Processing stage. On the client side (web browser), the video stream is captured by the mobile device's camera and processed by the Scandit SDK library (Camera & Scandit SDK block). The data obtained undergoes initial validation (Is Data Valid? logical block). If the data is corrupted or does not match the format, the algorithm terminates (No -> End branch), preventing incorrect requests from being sent to the server.

Server Processing Stage. If validation is successful (Yes branch), an asynchronous AJAX request to the

server is generated. The Magento system controller (Controller Logic block) receives the request and performs a search for matches in the database (Database Lookup block). The result is an update of the order basket status, which in this model acts as a "digital twin" of the physical delivery.

Output Generation stage. Based on the synchronized data of the digital twin, the system generates the final document—an invoice or specification (Generate Invoice block), after which the algorithm completes execution (End block).

This algorithm structure ensures data integrity throughout the entire process, from physical scanning to a legally valid document.

**Software implementation of modules**

To achieve this goal, two structural modules were developed for CMS Magento 2, allowing flexible expansion of functionality through a system of modules and plugins (Interceptors) [9].

A. Scanning module (Magento_BarcodeScanner). The module integrates the Scandit SDK for the Web library [10], which uses WebAssembly technology for high-speed video stream processing in the client's browser, ensuring the recognition of damaged or poorly lit barcodes.

*Algorithm of operation:*

1. Initialization of the camera via the browser API (navigator.mediaDevices).

2. Capture of the video stream and search for EAN-8/13 patterns.

3. Upon successful recognition, an AJAX request is sent to the SearchByEan controller.

4. The server searches the catalog_product_entity_varchar table by the ean attribute.

5. The product is automatically added to the "digital twin" (shopping cart) or an error message is displayed.

The key feature of the implementation is the use of the JavaScript Mixins pattern to extend Magento's standard behavior without modifying the core of the system.

B. Matrix order module (Magento_MultiSwatches). For products with variations (Configurable Products), a matrix interface has been implemented. Instead of the sequential selection "Color -> Size -> Add," the user sees a two-dimensional matrix.

*Technical implementation includes:*

- Extension of the mage.SwatchRenderer widget.
- Interception of the _OnClick event to prevent page reloading.
- Collection of the qty[] data array for all selected variations.
- Sending a single MultiAddToCart request, which significantly reduces the load on the document generation server.

**Results of the experimental study**

A series of tests was conducted to verify effectiveness. The operator was asked to create orders (documents) for 10, 50, and 100 items in three ways:

- Standard Magento interface (search by name).
- Matrix input (for clothing/footwear).
- Barcode scanning.

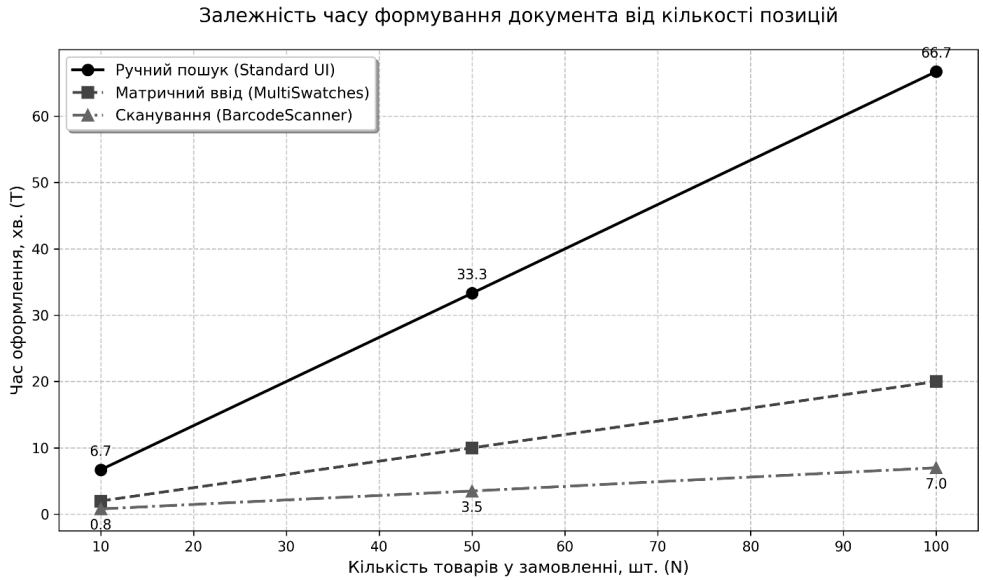


*Figure 2. Graph showing the dependence of time spent on order formation on the number of product items*

X-axis: Number of items (10, 20, ..., 100).Y-axis: Time in minutes. Line 1 (Manual input): Rises steeply (steep angle of inclination). Line 2 (Matrix): More gradual. Line 3 (Scanner): The most gradual, almost horizontal. Data example: For 50 items: Manual – 25 min, Matrix – 10 min, Scanner – 4 min.

The results are shown in Table 1. The results show a significant advantage of automated methods.

Table 1.

Comparative characteristics of document formation methods

| Formation method | Time per position (avg.) | Probability of error (Human Error) | Server load |
|---|---|---|---|
| Manual search | 30-45 c | High (text selection) | High (many requests) |
| Matrix input | 10-15 c | Average | Low (1 batch request) |
| Scanning (Barcode) | 3-5 c | Zero (hardware validation) | Average |

Particular attention should be paid to the error rate. When using the BarcodeScanner module, sorting errors (when a similar but not the same product is included in the document) are eliminated because the unique GTIN (Global Trade Item Number) identifier is read by the machine. This ensures that the generated delivery note corresponds 100% to the physically selected goods.

**Discussion: Integration with unified document management systems**

The data generated using the developed modules is stored in the Magento database (MySQL/MariaDB) in a structured form. This allows for automatic data export to XML or JSON formats for further transfer to legally significant document management systems (e.g., M.E.Doc, Vchasno) via API. The proposed approach transforms the role of the B2B portal: from a showcase, it becomes a data collection terminal that is part of a unified digital enterprise ecosystem.

**Conclusions**

It has been established that the bottleneck in document flow automation in B2B e-commerce is the specification filling stage. Manual methods are ineffective for orders with more than 20 items.

It is proposed to consider the order basket as a digital twin of the picking process, which requires the use of touch-based data entry methods.

The Magento_BarcodeScanner and Magento_MultiSwatches modules have been developed and implemented. Their use has reduced order processing time by an average of 5-6 times and minimized errors in the creation of primary documentation.

The prospect for further research is the integration of the developed modules with Blockchain technology to fix the immutability of the order composition at the scanning stage.

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# ИНТЕЛЛЕКТУАЛЬНАЯ СИСТЕМА РАННЕЙ ОЦЕНКИ КОММЕРЧЕСКИХ РИСКОВ ФИЛЬМОВ

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# INTELLIGENT SYSTEM FOR EARLY ASSESSMENT OF COMMERCIAL RISKS OF FILMS

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**Аннотация**

Статья посвящена проблеме высокой экономической неопределённости при принятии инвестиционных решений в кинопроизводстве. Предлагается архитектура интеллектуальной системы, использующей методы машинного обучения для анализа исключительно предрелизных данных. На примере работы с общедоступными наборами данных демонстрируется, что переход от однофакторных эвристик к многофакторным моделям обеспечивает значимое повышение точности прогнозирования вероятности окупаемости. Делается вывод о том, что предлагаемый подход позволяет систематизировать экспертизу и предоставить объективную количественную основу для управления рисками, не заменяя, а дополняя собой художественно-коммерческую оценку проекта.

**Abstract**

The article addresses the problem of high economic uncertainty in investment decision-making within the film industry. An architecture of an intelligent system is proposed that employs machine learning methods to analyze exclusively pre-release data. Using publicly available datasets as an example, it is demonstrated that moving from single-factor heuristics to multi-factor models leads to a significant improvement in the accuracy of predicting the likelihood of project profitability. It is concluded that the proposed approach helps systematize expert judgment and provides an objective quantitative basis for risk management, complementing rather than replacing artistic and commercial evaluation of film projects.

**Ключевые слова:** ранняя оценка рисков, кинопроизводство, машинное обучение, предрелизные данные, логистическая регрессия.

**Keywords:** early risk assessment, film production, machine learning, pre-release data, logistic regression.

## Введение

Кинематограф может рассматриваться как высокорисковая проектно-ориентированная отрасль, во многом сопоставимая с разработкой программного обеспечения. Как и в IT-проектах, значительная часть затрат приходится на ранние этапы жизненного цикла, тогда как фактический коммерческий результат становится известен лишь после завершения продукта и его вывода на рынок. Высокая стоимость производства фильмов сочетается с существенной неопределённостью спроса, что приводит к систематическим финансовым потерям.

Аналогично программным продуктам, лишь ограниченное число кинопроектов достигает коммерческого успеха, в то время как большинство либо не окупается, либо демонстрирует результаты ниже ожидаемых. Данная ситуация указывает на системную проблему, связанную с отсутствием формализованных моделей ранней оценки рисков. В условиях дефицита объективных количественных критериев решения о запуске проекта, объёме финансирования и целевой аудитории преимущественно основываются на субъективных факторах (экспертных оценках), интуиции продюсеров и художественном видении, что сближает кинопроизводство с практикой принятия рискованных решений в программной инженерии [5].

Формализация процесса оценки рисков на основе доступных объективных данных представляется актуальной научно-практической задачей. Её решение позволило бы перейти от интуитивных решений к управлению, основанному на данных, снизив уровень финансовой неопределённости для инвесторов и продюсеров. В более широком контексте данная задача является частным случаем общей проблемы оценки рисков в сложных программно-информационных системах и проектах с высокой степенью неопределённости исходных параметров. Настоящая статья посвящена разработке прототипа интеллектуальной системы, предназначенной для количественной оценки вероятности коммерческого провала кинопроекта по данным, известным до начала его широкого проката. В качестве провала формально понимается ситуация, в которой валовые кассовые сборы (revenue) оказываются ниже производственного бюджета (budget).

**Методологическая основа и подход к оценке рисков**

Методологическую основу системы составляет ансамбль моделей градиентного бустинга, реализованный в библиотеке LightGBM [1]. Выбор именно этой алгоритмической парадигмы обусловлен ее доказанной эффективностью в задачах регрессии на структурированных данных, способностью улавливать нелинейные взаимодействия признаков и относительно высокой интерпретируемостью результатов по сравнению с глубинным обучением. Особенностью подхода является использование не одной, а трех отдельных моделей, обученных для прогнозирования разных квантилей распределения будущих кассовых сборов. Основная модель обучается для предсказания условного математического ожидания (среднего значения), в то время как две вспомогательные модели оценивают пятый и девяносто пятый процентили. Эта триада позволяет охарактеризовать не только ожидаемый результат, но и разброс возможных исходов, что является ключевым для оценки риска.

**Данные, признаки и предобработка**

Подготовка данных является критически важным этапом, предшествующим обучению моделей. В качестве исходного набора данных использовалась общедоступная база TMDB, содержащая информацию о нескольких тысячах фильмов, включая бюджет, мировые сборы, жанры, рейтинги и другую метаинформацию. Для обеспечения релевантности прогнозов современному рынку из рассмотрения были исключены исторические фильмы, выпущенные до широкого распространения цифровых технологий дистрибуции. Кроме того, фильтровались аномальные записи с нулевым или символическим бюджетом, которые могли исказить закономерности. Важным шагом предобработки стало логарифмическое преобразование целевой переменной: кассовых сборов и бюджета.

Существующие академические исследования в области прогнозирования кассовых сборов можно условно разделить на две категории. Первая фокусируется на пост-продакшн прогнозировании, используя данные о предварительных продажах билетов, ранних зрительских отзывах и активности в социальных сетях незадолго до релиза [2]. Вторая категория пытается предсказать успех на более ранних стадиях, анализируя сценарии, участие звезд или характеристики режиссеров. Предлагаемая система занимает промежуточную позицию, нацеливаясь на момент принятия решения о «зеленом свете», когда сценарий утвержден, бюджет предварительно оценен, но съемки еще не начались [1]. В этот момент доступны структурированные данные, которые могут служить основой для прогноза, но при этом решение еще может быть скорректировано с учетом анализа рисков.

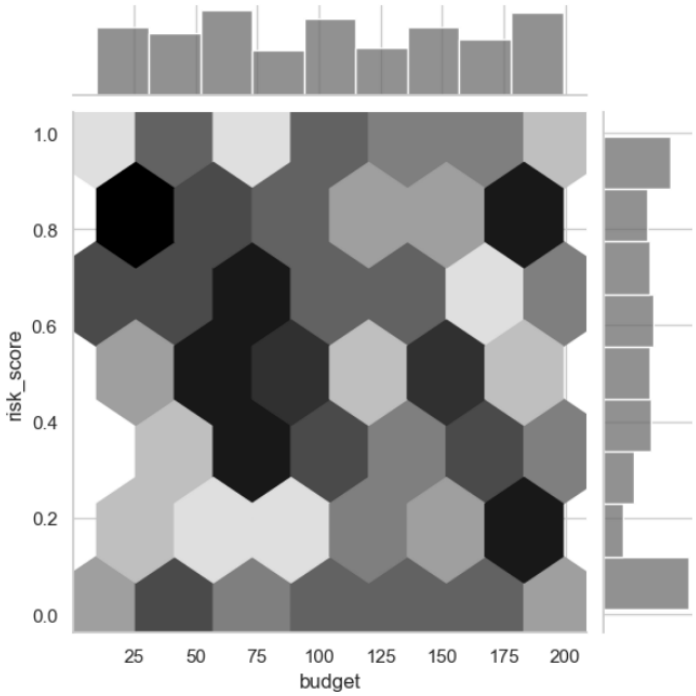


*Рисунок 1. Корреляция бюджета (x) и коммерческого риска (y).*

Из исходных данных извлекался набор признаков, который можно разделить на несколько категорий. Бюджет, будучи основным драйвером производственных возможностей и маркетинговой поддержки, является самым весомым числовым признаком. Жанровая принадлежность кодируется с помощью метода one-hot encoding, превращая категориальную переменную в набор бинарных признаков [8].

**Архитектура системы, обучение и интерпретация результатов**

Практическая ценность системы раскрывается при переходе от оценки единичных проектов к оптимизации портфеля. Студия или независимый продюсер редко инвестирует в единственный фильм; типичной практикой является формирование слэта - набора проектов, находящихся в произ-

водстве одновременно. Задача портфельной оптимизации заключается в таком отборе проектов из доступного пула разработки, который максимизирует ожидаемую доходность всего слэта при соблюдении ограничений по общему бюджету и допустимому совокупному риску [7]. Предложенная система реализует жадный алгоритм для решения этой задачи. Каждому проекту присваивается балл, учитывающий как его ожидаемую доходность, так и коэффициент риска. Проекты сортируются по убыванию этого балла, и в портфель последовательно включаются те из них, которые укладываются в оставшийся бюджет и не превышают установленный лимит по индивидуальному риску. В результате формируется сбалансированный портфель, устойчивый к реализациям негативных сценариев по отдельным его компонентам [4].

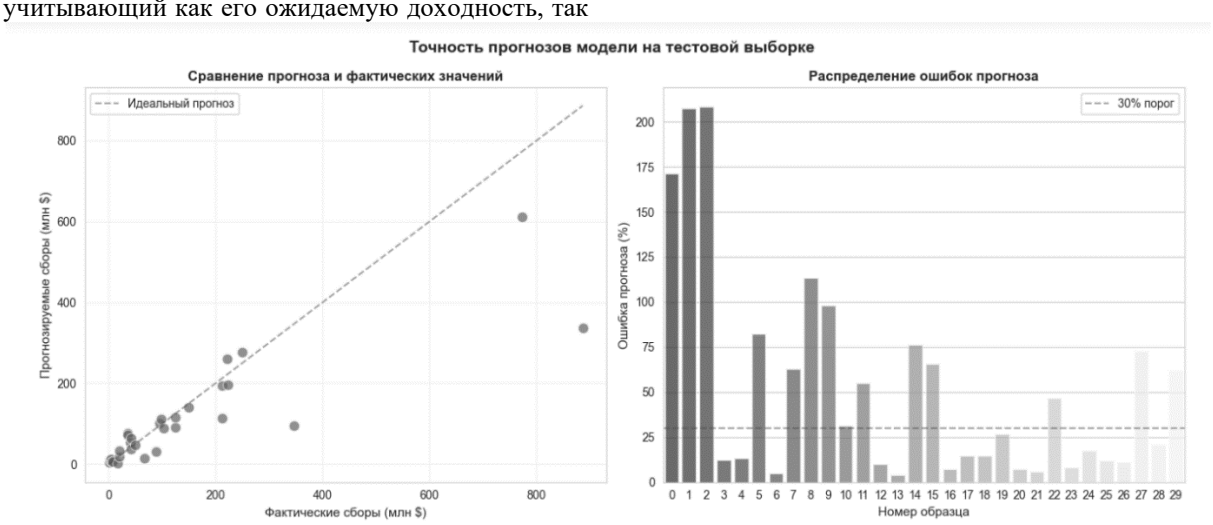


*Рисунок 2. Точность прогнозов модели на тестовой выборке.*

Представленные результаты на тестовой выборке демонстрируют практическую применимость разработанной интеллектуальной системы для ранней оценки коммерческих рисков кинопроектов. Сравнение прогнозируемых и фактических кассовых сборов показывает, что в большинстве случаев модель формирует оценки, находящиеся вблизи идеальной линии соответствия, что свидетельствует о наличии устойчивой корреляции между предсказанными и реальными значениями. При этом наибольшая точность достигается для фильмов с низким и средним уровнем сборов, которые и составляют основную долю рынка, а значит, представляют наибольший интерес с точки зрения минимизации инвестиционных рисков [6].

Для значительной части выборки относительная ошибка не превышает заданный порог в 30 %, что можно считать приемлемым уровнем точности на этапе раннего планирования. Одновременно с этим наблюдаются отдельные выбросы, преимущественно связанные с высокобюджетными и высокорисковыми проектами, коммерческий успех которых в большей степени зависит от трудноформализуемых факторов, таких как маркетинговая стратегия, информационный фон и зрительские предпочтения в момент релиза [10].

**Заключение**

Проведённый анализ показывает, что коммерческий успех фильма не является полностью случайным явлением и в определённой степени поддаётся ранней количественной оценке на основе предрелизных данных. Использование статистического анализа и методов машинного обучения позволяет выявить устойчивые связи между характеристиками проекта и его финансовым результатом, что делает возможной формализацию коммерческого риска ещё до выхода фильма в прокат.

Вместе с тем полученные результаты демонстрируют принципиальные ограничения такой оценки. Даже при использовании расширенного набора факторов и современных аналитических методов сохраняется значительная зона неопределённости, обусловленная влиянием внешних событий, зрительского восприятия и трудно формализуемых культурных факторов.

Анализ позволяет снизить уровень неопределённости, но не устранить его полностью. При дальнейшем расширении набора предрелизных признаков, улучшении качества данных и применении интерпретируемых методов машинного обучения есть потенциал значительно повысить точность прогнозирования коммерческого успеха фильмов. Интеллектуальная система оценки рисков может стать эффективным инструментом поддержки решений продюсеров и инвесторов, предоставляя количественно обоснованную основу для ранней идентификации проектов с повышенным или пониженным риском, а не заменяя художественно-коммерческую экспертизу.

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